

## Quick Reference Guide

### Truist Online Banking Getting Started with Direct Connect

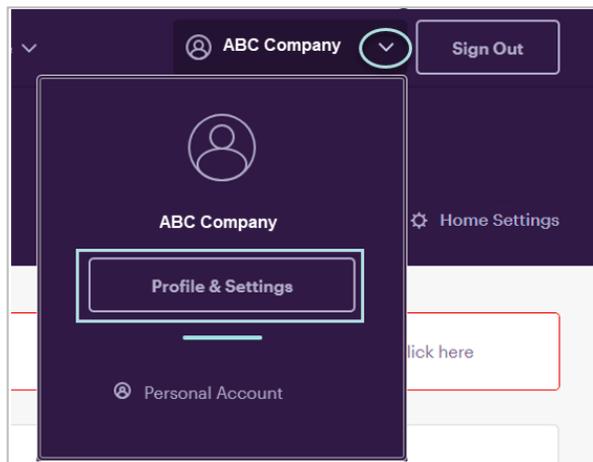
The Direct Connect service allows you to download transactions, update account balances automatically, pay bills and transfer money between your Truist accounts using the desktop version of QuickBooks® or Quicken®. This guide provides instructions for:

- [Subscribing to the Direct Connect service](#)
- [Registering a data file for QuickBooks](#)
- [Registering a data file for Quicken](#)
- [Cancelling the Direct Connect service](#)

### Subscribing to Direct Connect

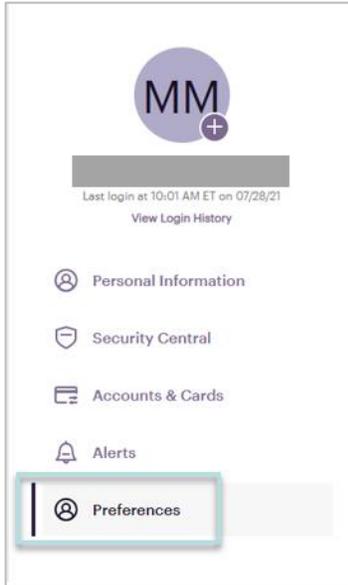
To subscribe to Direct Connect:

1. From the Online Banking profile drop down, click **Profile & Settings**.

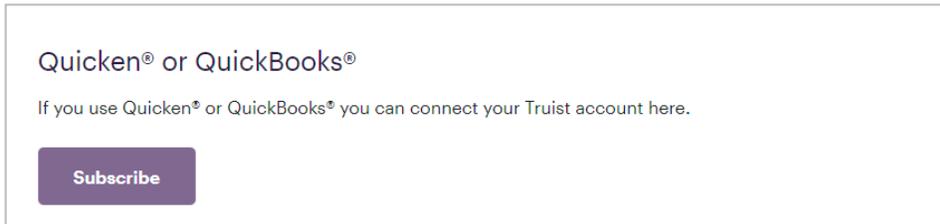


## Online and Mobile Banking: Getting Started with Direct Connect

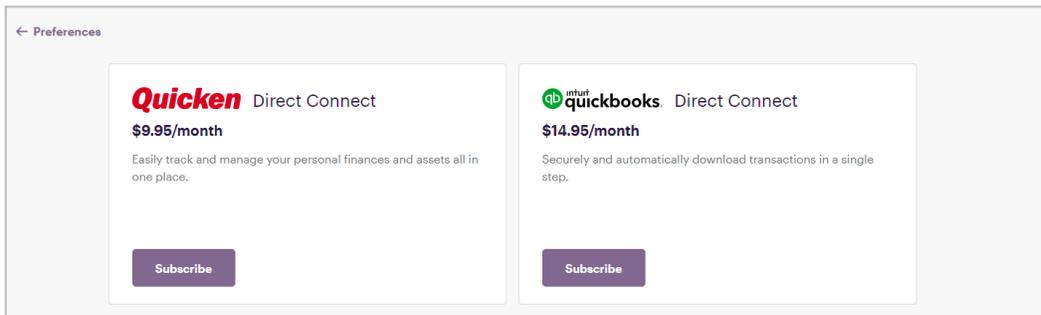
2. Click **Preferences**.



3. Click **Subscribe** in the *Quicken®* or *QuickBooks®* section.

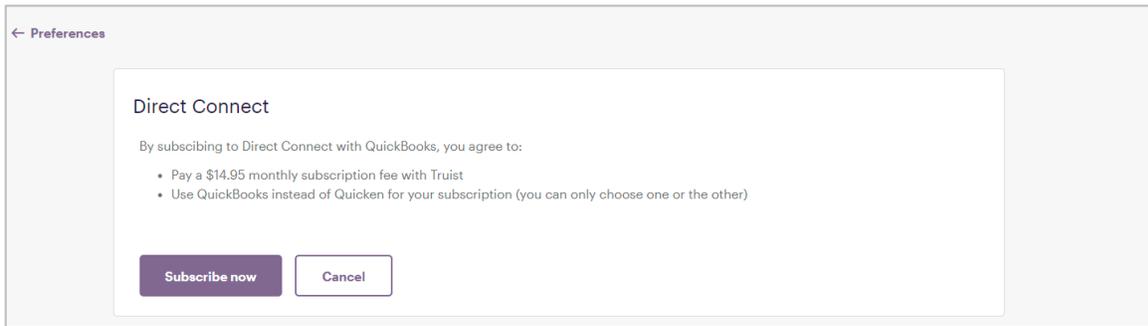


4. Click the **Subscribe** button for the service you want to use.



## Online and Mobile Banking: Getting Started with Direct Connect

5. Confirm your selection by clicking **Subscribe now**.



← Preferences

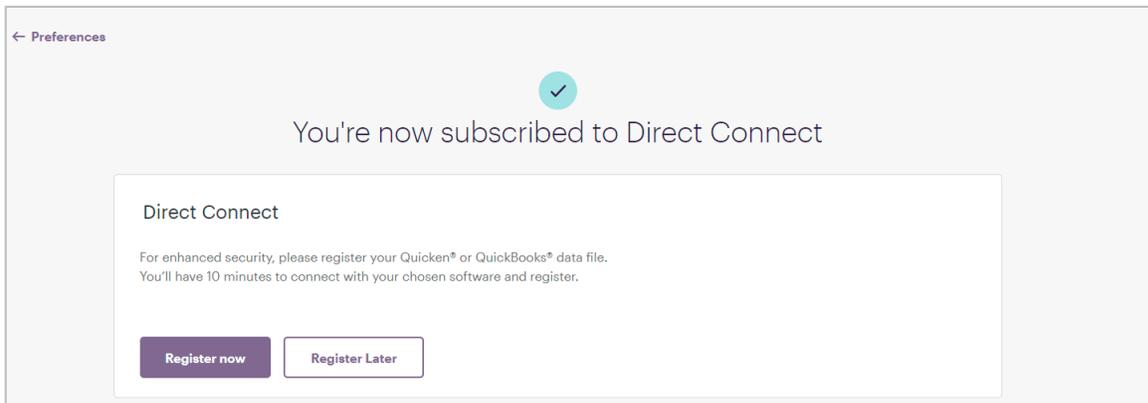
**Direct Connect**

By subscribing to Direct Connect with QuickBooks, you agree to:

- Pay a \$14.95 monthly subscription fee with Truist
- Use QuickBooks instead of Quicken for your subscription (you can only choose one or the other)

**Subscribe now** Cancel

A confirmation screen displays. Your subscription is active at this time, but to start receiving the transaction downloads, you must register one or more data files. You can register the files immediately or register the files later.



← Preferences

✓

You're now subscribed to Direct Connect

**Direct Connect**

For enhanced security, please register your Quicken® or QuickBooks® data file.  
You'll have 10 minutes to connect with your chosen software and register.

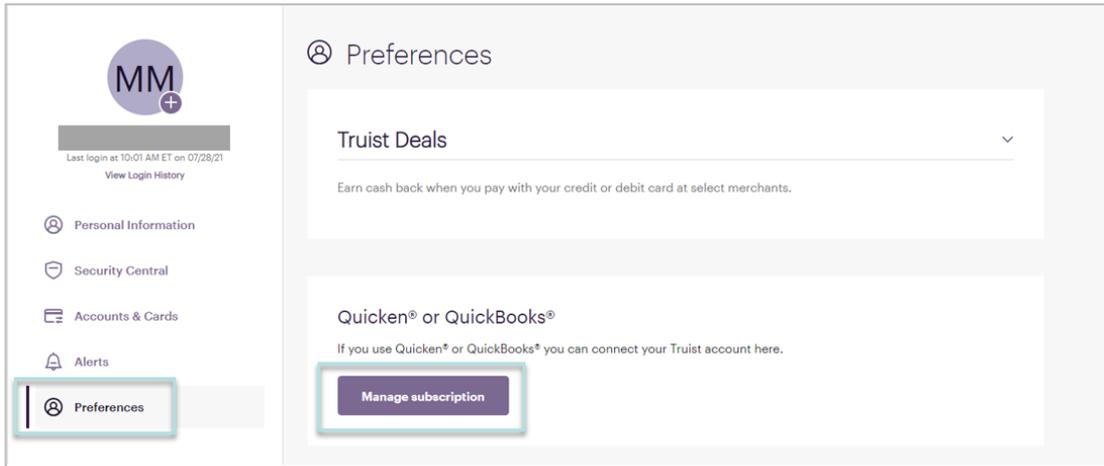
**Register now** Register Later

## Registering a data file for QuickBooks

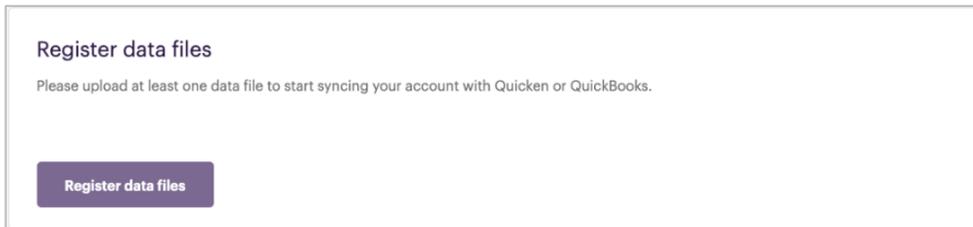
You can register a data file immediately after subscribing to the Direct Connect service (continuation of the steps above) or return to **Profile & Settings > Preferences** when you are registering the files at a later time.

To register a data file for QuickBooks:

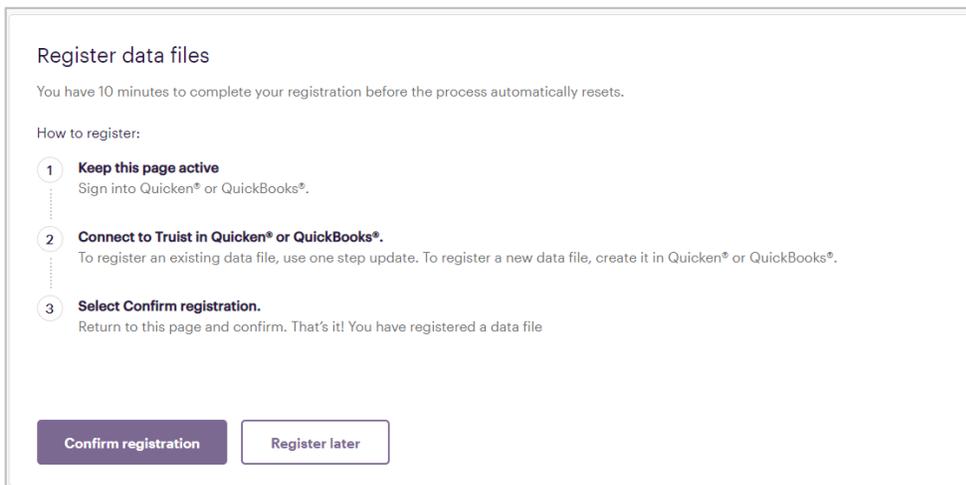
1. In the Preferences *Quicken®* or *QuickBooks®* section, click **Manage subscription**.



2. Click **Register data files**.



3. The *Register data files* page displays. Keep this page active as you proceed with the following steps.

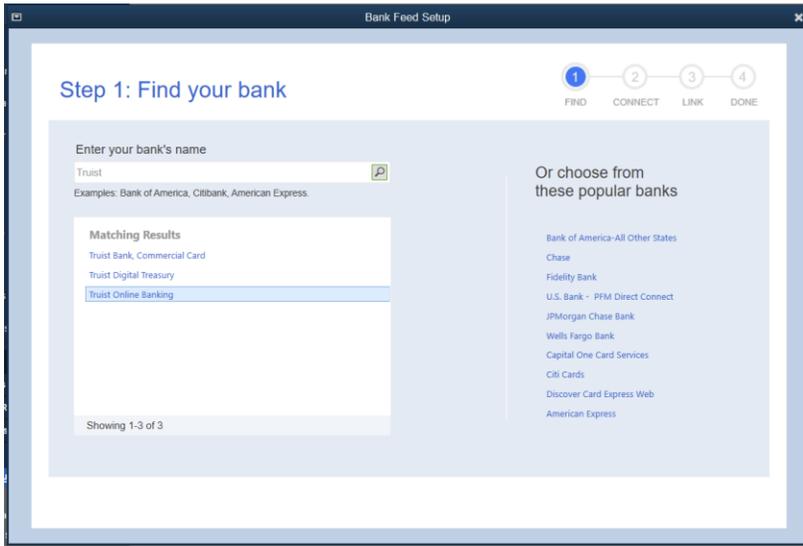


4. Log in to your desktop version of QuickBooks.

**Note:** Your QuickBooks screens may differ depending on the version of QuickBooks you use.

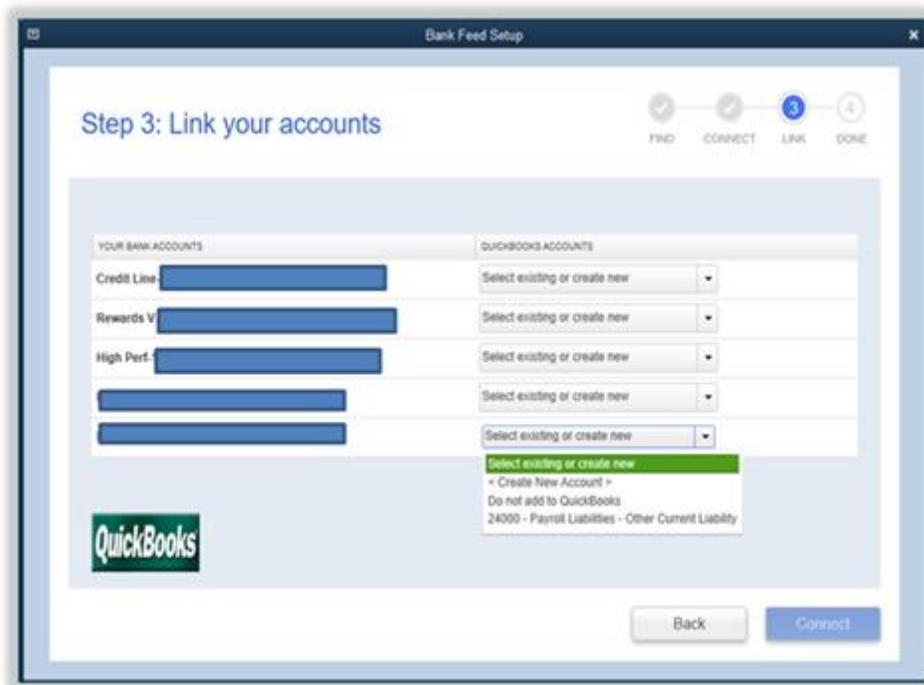
## Online and Mobile Banking: Getting Started with Direct Connect

- From the Online Banking Assistant, search for and select **Truist - Online Banking** as your financial institution. Click **Next**.



The screenshot shows the 'Bank Feed Setup' window at 'Step 1: Find your bank'. The progress bar at the top indicates four steps: 1. FIND (active), 2. CONNECT, 3. LINK, and 4. DONE. On the left, there is a search box with 'Truist' entered and a magnifying glass icon. Below it, examples of banks are listed: Bank of America, Citibank, American Express. A 'Matching Results' box shows three items: 'Truist Bank, Commercial Card', 'Truist Digital Treasury', and 'Truist Online Banking' (highlighted). At the bottom left of this box, it says 'Showing 1-3 of 3'. On the right, there is a section titled 'Or choose from these popular banks' with a list of banks: Bank of America-All Other States, Chase, Fidelity Bank, U.S. Bank - PFM Direct Connect, JPMorgan Chase Bank, Wells Fargo Bank, Capital One Card Services, Citi Cards, Discover Card Express Web, and American Express.

- You are asked how you want to connect to your financial institution. Select **Direct Connect**, then click **Next**.
- You are asked if you have contacted your financial institution to activate your account for QuickBooks services. Select **Yes, my account has been activated for QuickBooks online services**. (You activated your account when you registered for the Direct Connect service in online banking.)
- You are prompted to enter your Customer ID and password. Enter your online banking **User ID** and **Password**, confirm your password and click **Sign In**.
- Your online banking accounts display. For the accounts you want to add to QuickBooks, click **Select an Account**. After selecting the desired QuickBooks account for each online banking account you want to connect, click **Next**.



The screenshot shows the 'Bank Feed Setup' window at 'Step 3: Link your accounts'. The progress bar at the top indicates four steps: 1. FIND, 2. CONNECT, 3. LINK (active), and 4. DONE. The main area is divided into two columns: 'YOUR BANK ACCOUNTS' and 'QUICKBOOKS ACCOUNTS'. Under 'YOUR BANK ACCOUNTS', there are five rows, each with a blue bar representing a bank account name. Under 'QUICKBOOKS ACCOUNTS', there are five dropdown menus, each with the text 'Select existing or create new'. A dropdown menu is open, showing options: 'Select existing or create new' (highlighted in green), '< Create New Account >', 'Do not add to QuickBooks', and '24000 - Payroll Liabilities - Other Current Liability'. At the bottom left, there is a QuickBooks logo. At the bottom right, there are two buttons: 'Back' and 'Connect'.

- A confirmation message displays. Click **Done**.

11. Return to the *Register data files* page in online banking and click **Confirm registration**.

### Register data files

You have 10 minutes to complete your registration before the process automatically resets.

How to register:

- 1 Keep this page active**  
Sign into Quicken® or QuickBooks®.
- 2 Connect to Trust in Quicken® or QuickBooks®.**  
To register an existing data file, use one step update. To register a new data file, create it in Quicken® or QuickBooks®.
- 3 Select Confirm registration.**  
Return to this page and confirm. That's it! You have registered a data file

**Confirm registration** Register later

Your data file registration with QuickBooks is complete.

### Register data files

Please upload at least one data file to start syncing your account with Quicken or QuickBooks.

✔ QuickBooks Mac 2020 registered July 26, 2021 at 1:59 PM ET

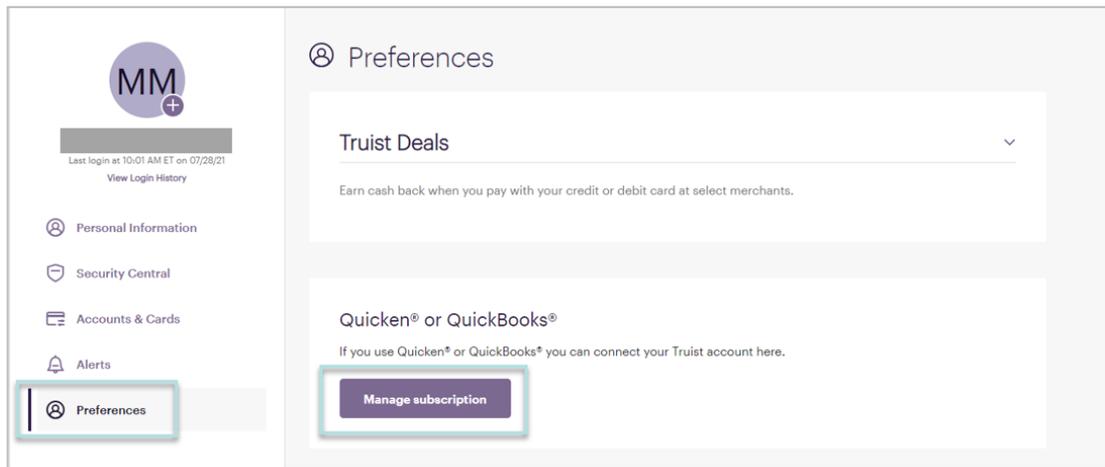
**Register data files**

## Registering a data file for Quicken

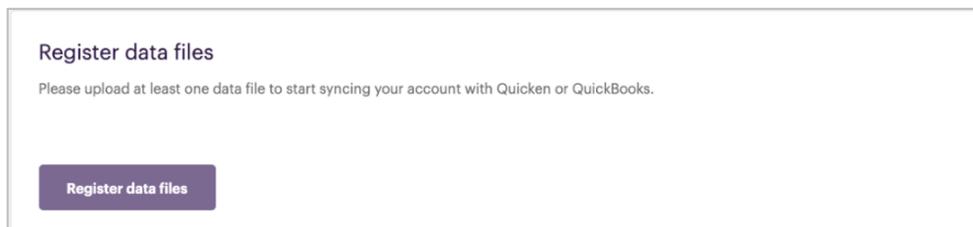
You can register a data file immediately after subscribing to the Direct Connect service (continuation of the steps in *Subscribing to Direct Connect*) or return to **Profile & Settings > Preferences** when you are registering the file at a later time.

To register a data file for Quicken:

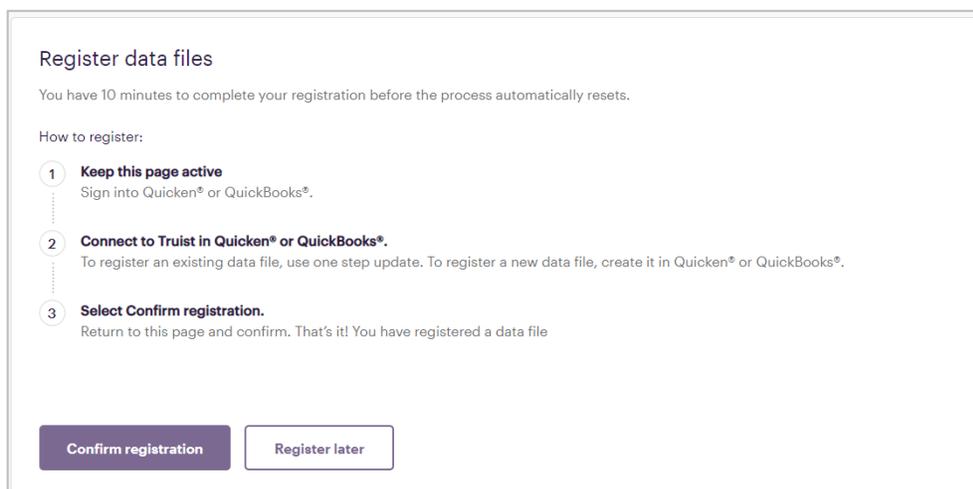
1. In the Preferences *Quicken® or QuickBooks®* section, click **Manage subscription**.



2. Click **Register data files**.

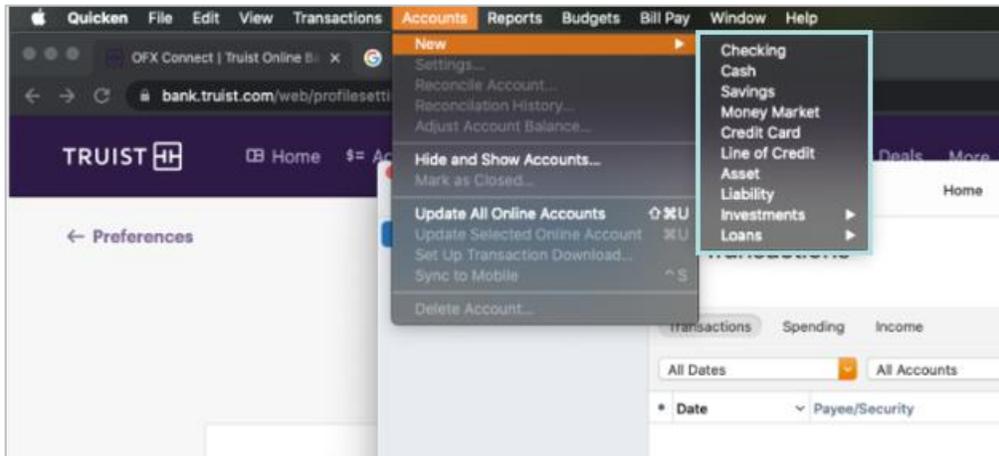


3. From Truist Online Banking, make sure the *Register data files* page is active.

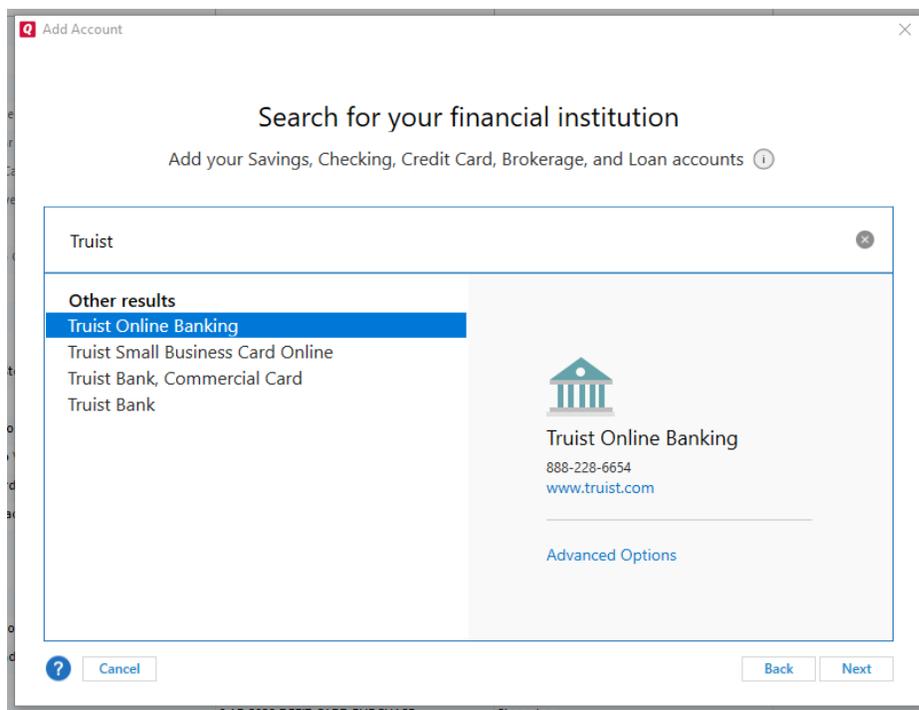


## Online and Mobile Banking: Getting Started with Direct Connect

- Log in to your desktop version of Quicken.  
**Note:** Your Quicken screens may differ depending on the version of Quicken you use.
- Select **Accounts > New > [account type]**. (In this example, we select Checking.)



- Search for and select **Truist Online Banking** from the bank list, then click **Continue**.



- You are asked how Quicken should connect. Select **Direct Connect** and click **Continue**.
- You are prompted to enter your online banking User ID and Password. Enter the information and click **Continue**.

## Online and Mobile Banking: Getting Started with Direct Connect

9. Your online banking accounts display. For the accounts you want to add to Quicken, select **Add** from the Action pull down list and provide a Quicken account name. Click **Continue**.

**Add Checking Account**

### 2 Accounts Found

Add or link the accounts you would like added to Quicken.

Account Name & Description	Type	Action	Quicken Account Name
Checking [redacted] 8424	Checking	Ignore	
Checking [redacted] 8416	Checking	Add	Bizzy

Cancel Continue

10. The transactions for the account download to Quicken and a confirmation message displays. Click **Finish**.

**Add Checking Account**

### 1 Account Added

Add more accounts or click Finish to start using Quicken!

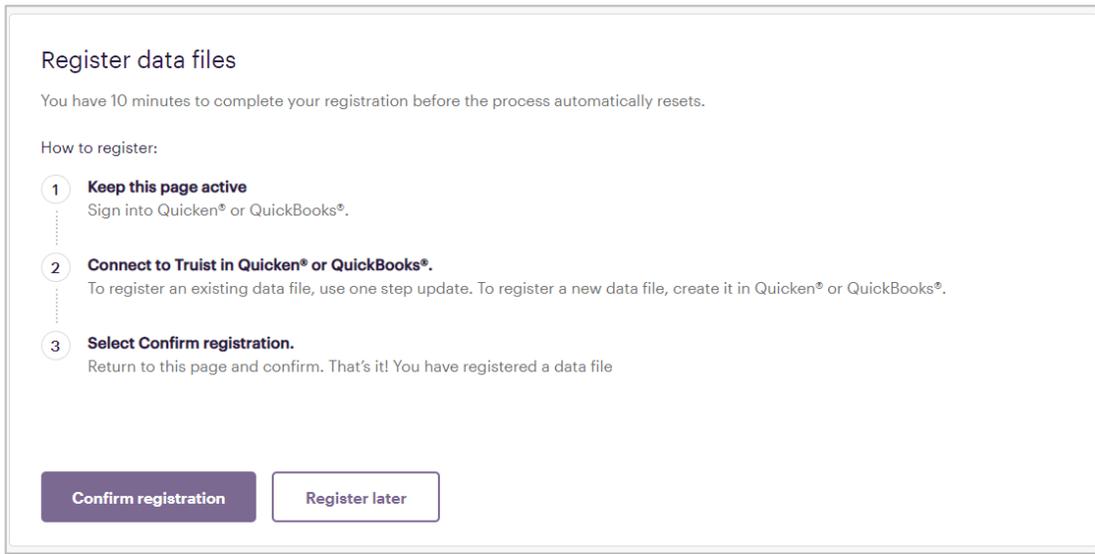
✓ **Bizzy**  
Downloaded 46 Transactions

**Add more accounts**  
Like a savings account or credit card  
+ Add another account

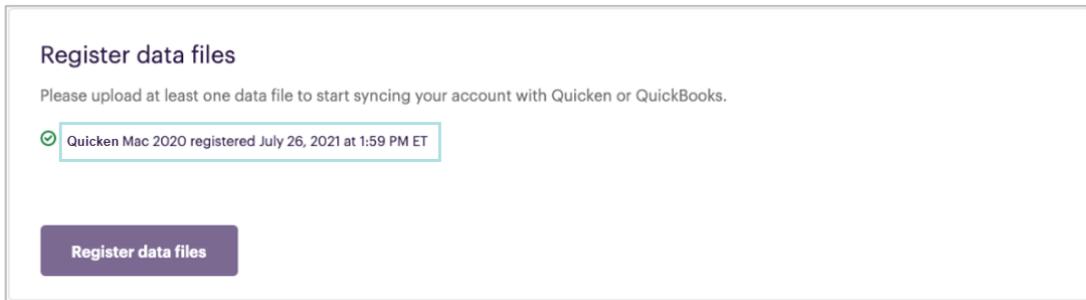
**Or Start Using Quicken Now**  
You can always add more accounts later  
Click the "Finish" button below

Finish

11. Return to the *Register data files* page in online banking and click **Confirm registration**.



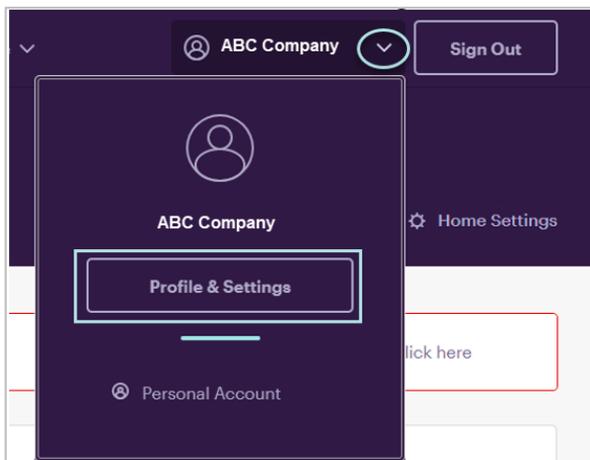
Your data file registration with Quicken is complete.



## Cancelling Direct Connect Service

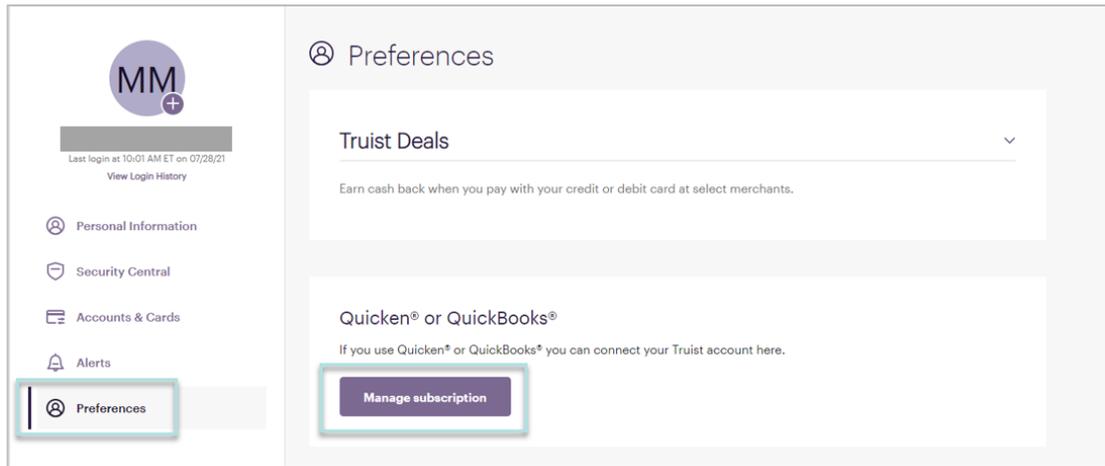
To cancel your Direct Connect service:

1. Access **Profile & Settings**.

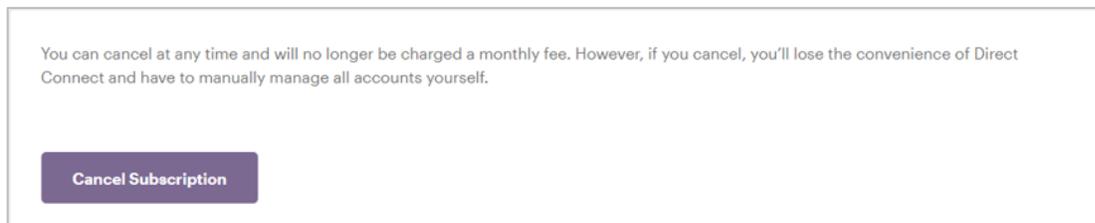


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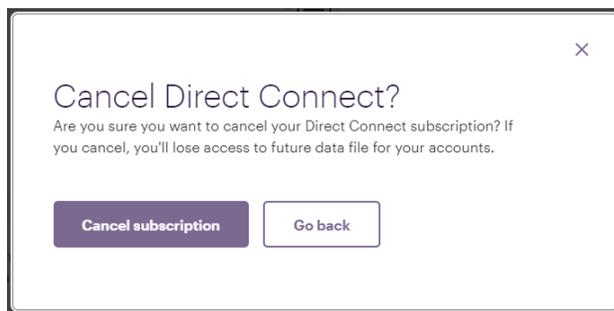
2. Select **Preferences**, then click **Manage subscription** for Quicken or QuickBooks.



3. Select **Cancel Subscription**.

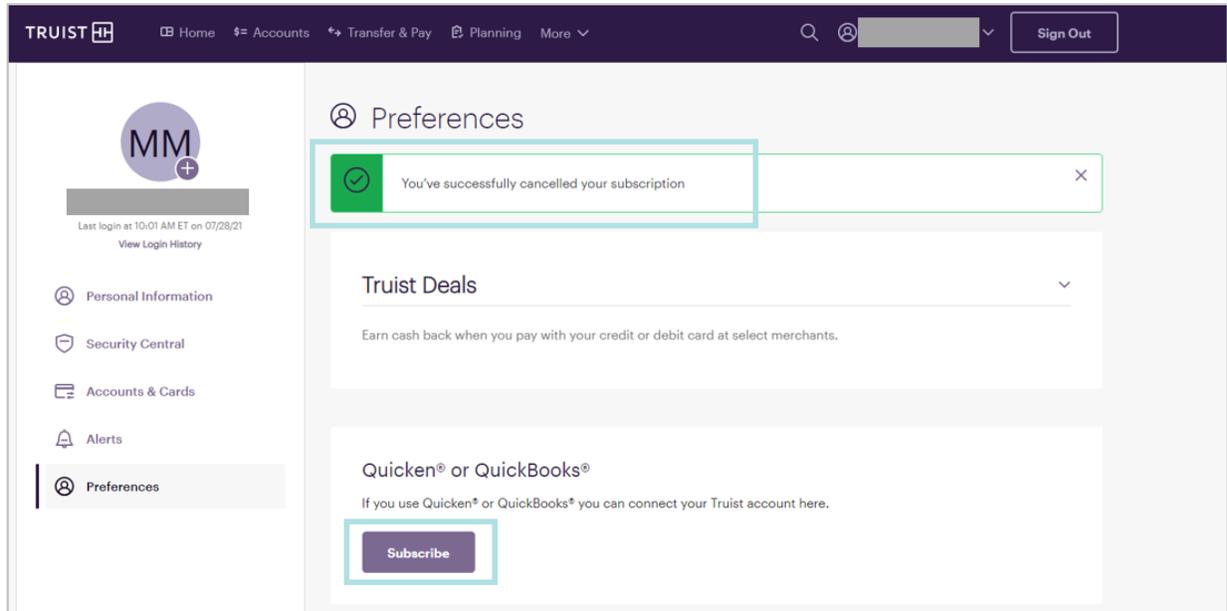


4. A confirmation message displays. Click **Cancel subscription**.



## Online and Mobile Banking: Getting Started with Direct Connect

5. Online banking notifies you that your Direct Connect subscription has been cancelled and the Subscribe button is available.



## Getting Additional Help

If your **User ID** or **Password** becomes disabled, contact your administrator about resetting your User ID and Password.

For other assistance, call the Truist Contact Center at 844-4TRUIST (844-487-8478). Representatives for online banking are available from 8 am to 8 pm ET, Monday through Friday and 8 am to 5 pm ET on Saturday. Hours may differ on bank holidays.