

## Quick Reference Guide

### Truist Online Banking

#### Direct Connect transition from SunTrust to Truist

The weekend of February 19, 2022, SunTrust systems transitioned to Truist. The transition included Direct Connect, the service you use to access your bank account information in QuickBooks or Quicken. After the transition, Direct Connect will be part of Truist online banking, so you'll need to sign in to Truist online banking or create a Truist online banking profile to reestablish the Direct Connect service.

This guide provides instructions that cover the steps to reestablish Direct Connect with Truist. Not all steps are required based on how you use some of the features with Direct Connect.

Steps to be completed by all clients:

1. Deactivate your accounts in Quicken or QuickBooks
  - How to deactivate your account in Quicken – [Windows](#) [Mac](#)
  - How to deactivate your account in QuickBooks – [Windows](#) [Mac](#)
2. Sign on to Truist online banking or create Truist online banking profile. A Truist online banking profile is required to subscribe to Direct Connect with Truist
  - [How to enroll in Truist online banking for personal accounts](#)
  - [How to enroll in Truist online banking for business accounts](#)
3. Subscribe to Direct Connect within online banking and register a data file with Quicken or QuickBooks
  - [Subscribe to Direct Connect](#)
    - Note: For business clients, only the business profile owner can subscribe to Direct Connect
  - Set up Quicken with Direct Connect for [Windows](#) [Mac](#)
  - Set up QuickBooks with Direct Connect for [Windows](#) [Mac](#)

**Note: Select 'Truist Online Banking' when selecting the financial institution in Quicken or QuickBooks.**

Direct Connect feature specific steps:

- Repoint any scheduled transfers to Truist Online Banking from SunTrust within Quicken/QuickBooks.
- Paying bills from Direct Connect
  - If you pay bills from Direct Connect and did not have a SunTrust Online Banking profile
    - [Click here](#) to see how you are impacted
  - If you pay bills from Direct Connect and have a SunTrust Online Banking profile
    - [Click here](#) to see how you are impacted

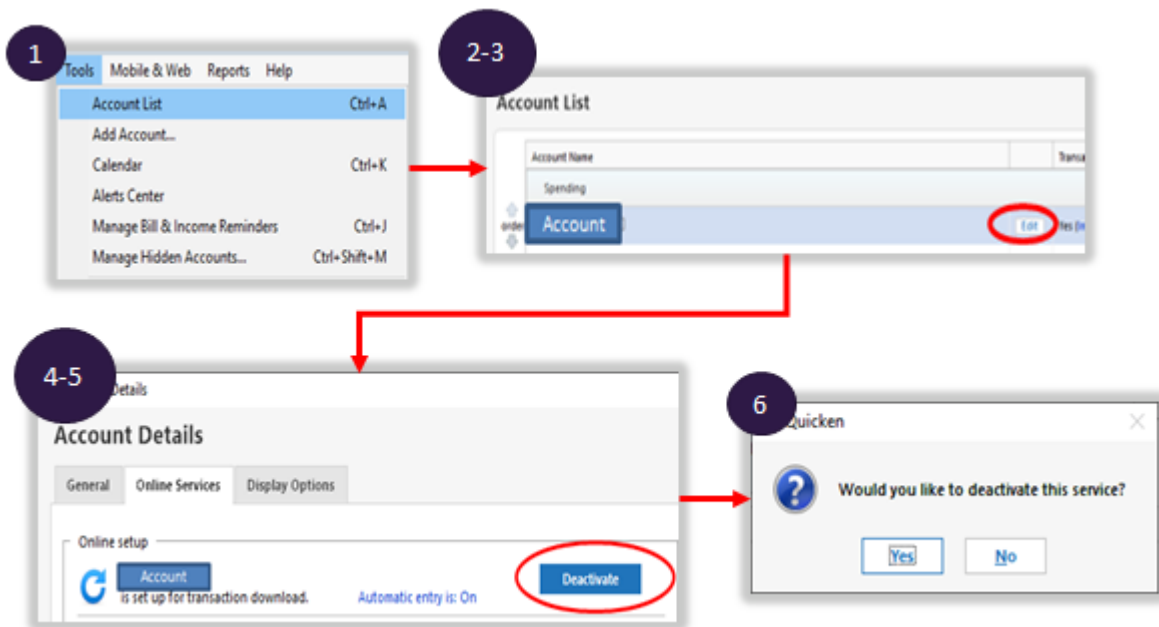
Important transition information:

- All bill payments that were scheduled with SunTrust were cancelled and must be recreated once reenrolled with Direct Connect.
- No transaction downloads and scheduling of new bill payments or transfers will occur after February 17, 2022.
- When downloading transactions for the first time with Truist, there may be duplicate transactions that will be required to be removed from Quicken or QuickBooks.
- Clients using Direct Connect with Wealthscape Investor are not impacted by this transition.

## Deactivating Accounts in Quicken – Windows

Before you can enroll in Direct Connect with Truist, you will first need to deactivate your SunTrust connection in Quicken.

1. From the Menu Bar, go to Tools
2. Select Account List
3. Click on Edit button to the right of the close account
4. Click on Online Services tab
5. Click Deactivate
6. Click Yes to confirm you want to deactivate the account

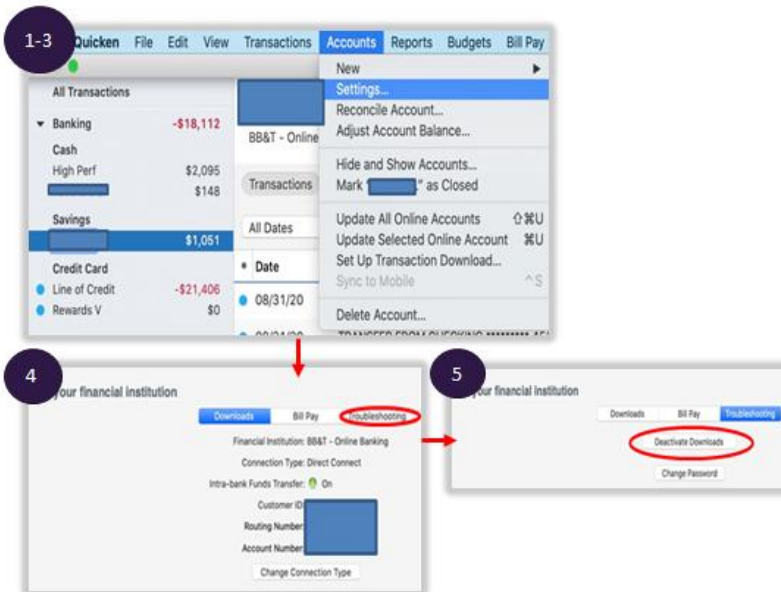


[Back to top of the document](#)

## Deactivating Accounts in Quicken – Mac

Before you can enroll in Direct Connect with Truist, you will first need to deactivate your SunTrust connection in Quicken.

1. There is an Account List on the left hand side. Highlight the account you'd like to edit in the Account List.
2. From the Menu Bar, select Accounts
3. Select Settings
4. Click on the Troubleshooting tab
5. Click on Deactivate Downloads

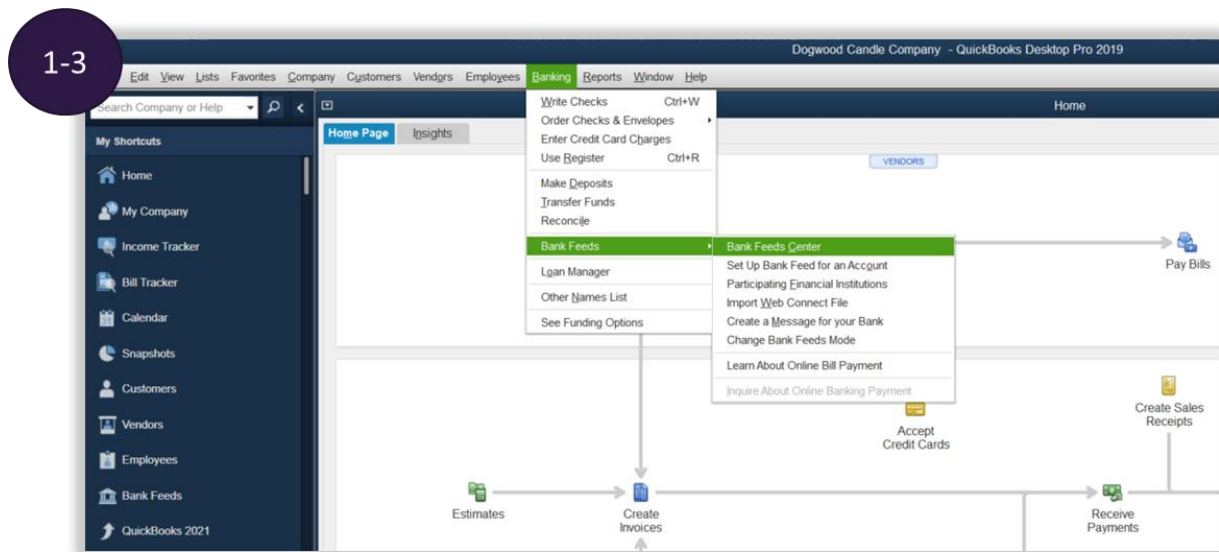


[Back to top of the document](#)

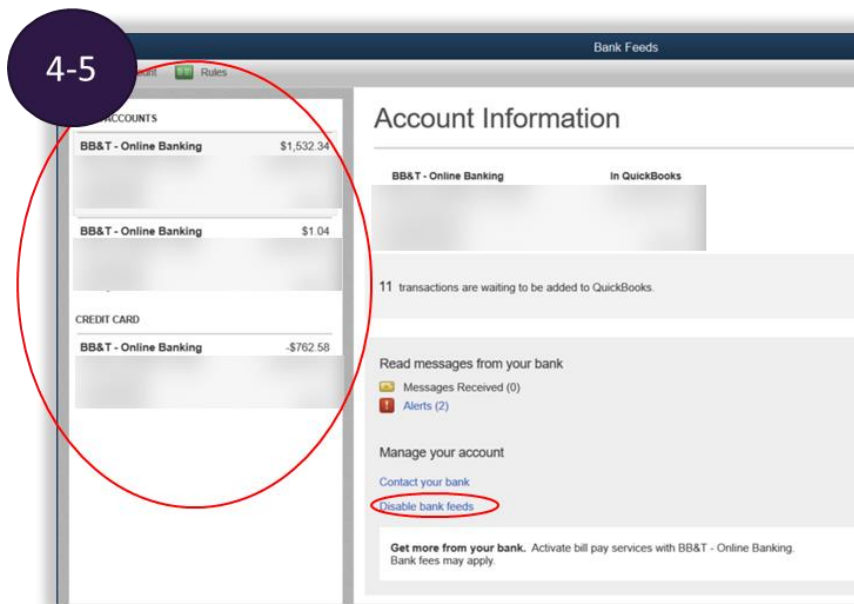
### Deactivating Accounts in QuickBooks – Windows

Before you can enroll in Direct Connect with Truist, you will first need to deactivate your SunTrust connection in QuickBooks.

1. From the Menu Bar, go to Banking
2. Select Bank Feeds
3. Click on Bank Feeds Center



4. Select the account on the left hand side
5. Click Disable Bank Feeds



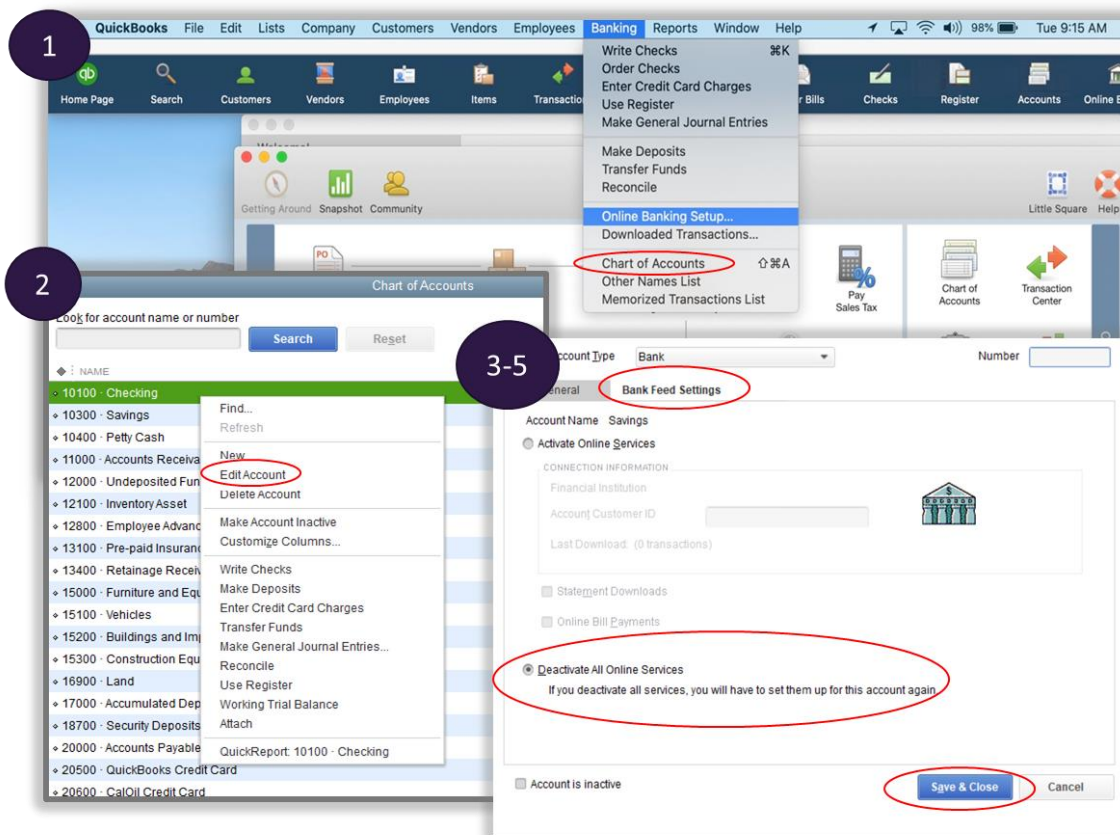
Note: If you have downloaded transactions that have not yet been added to QuickBooks, you will not be able to disable bank feeds. You must add or delete those transactions before you can continue.

[Back to top of the document](#)

## Deactivating Accounts in QuickBooks – Mac

Before you can enroll in Direct Connect with Truist, you will first need to deactivate your SunTrust connection in QuickBooks.

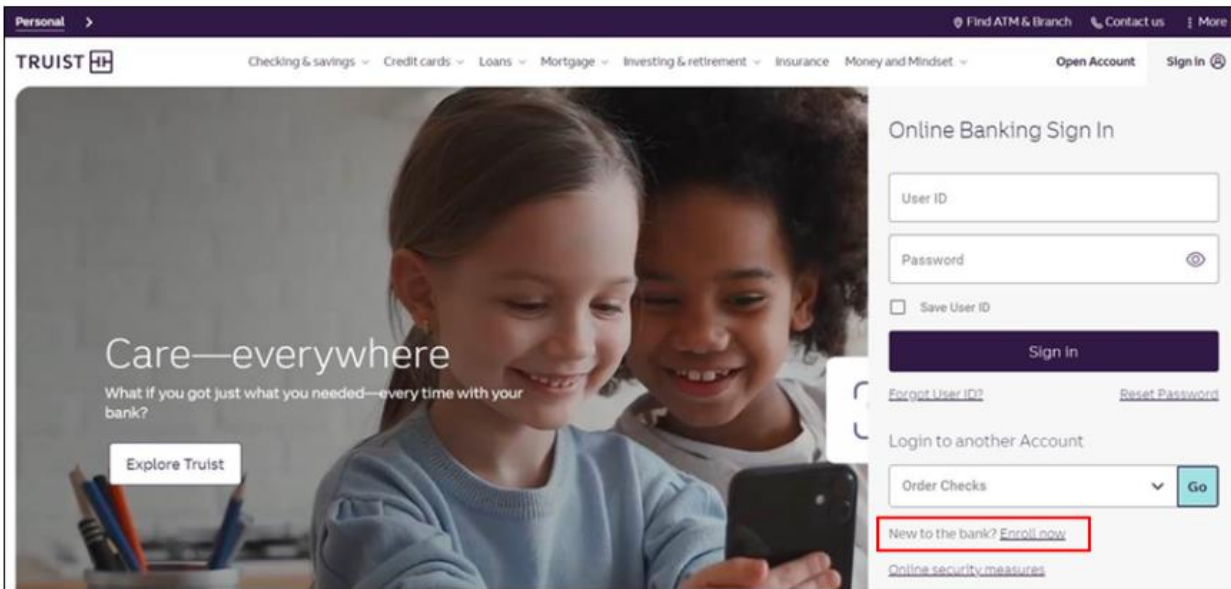
1. From the menu bar, select Banking, then select Chart of Accounts.
2. Right-click the account that needs to be deactivated, then click Edit Account.
3. Go to the Bank Feed Settings tab.
4. Click Deactivate All Online Services. You should get a confirmation that you've just disabled one or more online services for the account. Click OK.
5. Click Save & Close.



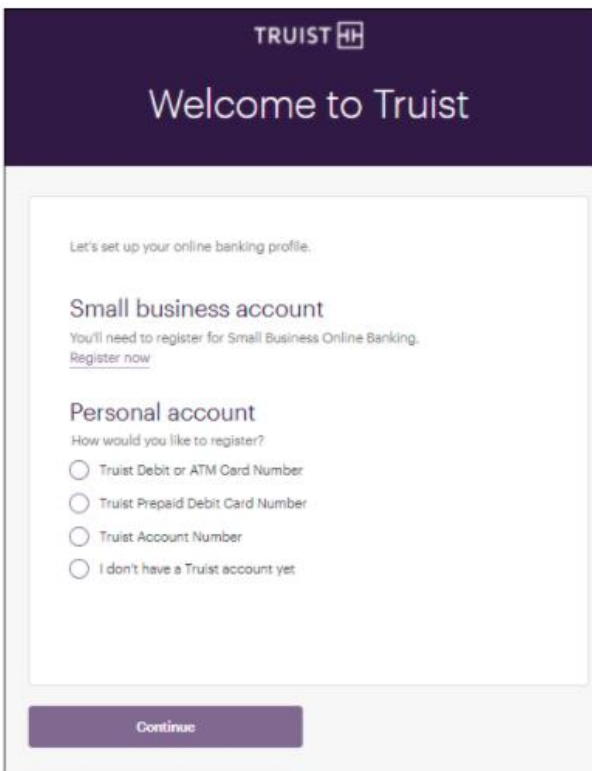
[Back to top of the document](#)

## Enroll in Truist online banking for personal accounts

1. Click 'Enroll Now' below the Online Banking Sign In section on truist.com.

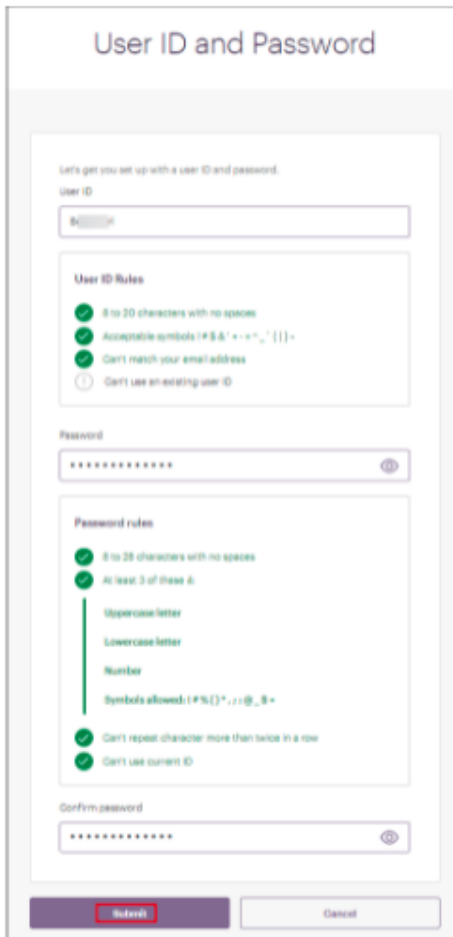


2. Select how you would like to register under Personal account and then click 'Continue'.



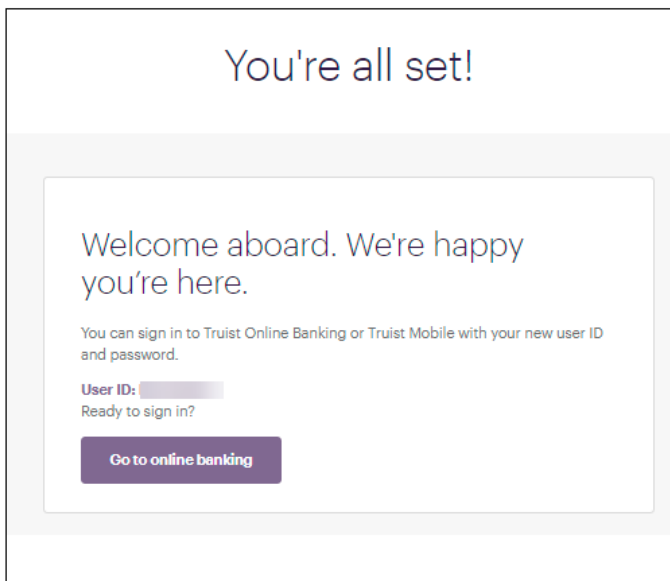
3. Provide the required information based on the registration option selected and click 'Continue'.
4. A list of questions to verify your identity will be presented. Click on the applicable response to each question.

5. Create a User ID, Password, and Confirm password. When finished click 'Submit'.



The screenshot shows a mobile app screen titled "User ID and Password". Below the title, it says "Let's get you set up with a user ID and password." There are three input fields: "User ID", "Password", and "Confirm password". Each field has a corresponding "Rules" section below it. The "User ID Rules" section includes: "8 to 20 characters with no spaces", "Acceptable symbols: ! # \$ % ' \* - + = , \_ { } ~", "Can't match your email address", and "Can't use an existing user ID". The "Password rules" section includes: "8 to 20 characters with no spaces", "At least 3 of these 4:", "Uppercase letter", "Lowercase letter", "Number", "Symbols allowed: ! # % ( ) \* - + = , \_ { } ~", "Can't repeat character more than twice in a row", and "Can't use current ID". At the bottom, there are two buttons: "Submit" (highlighted with a red box) and "Cancel".

6. "Welcome aboard. We're happy you're here." confirmation message displays. Click 'Go to online banking' to sign in with the newly created User ID and Password.



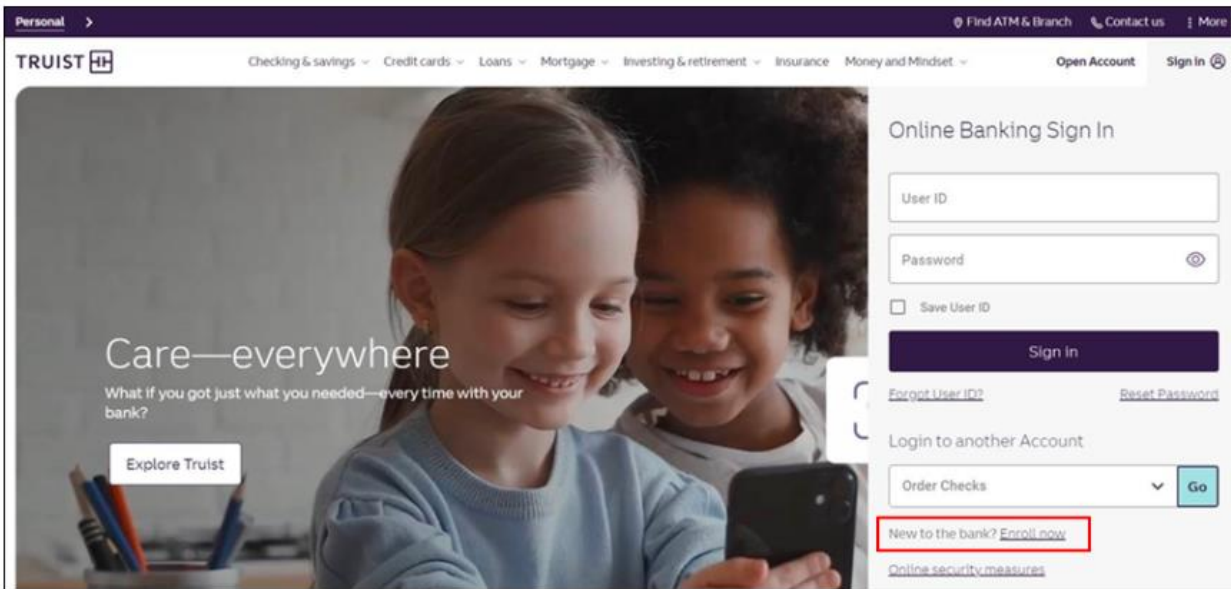
The screenshot shows a mobile app screen titled "You're all set!". Below the title, it says "Welcome aboard. We're happy you're here." and "You can sign in to Truist Online Banking or Truist Mobile with your new user ID and password." There is a "User ID:" label followed by a masked input field. Below that, it says "Ready to sign in?". At the bottom, there is a button labeled "Go to online banking".

[Back to top of the document](#)

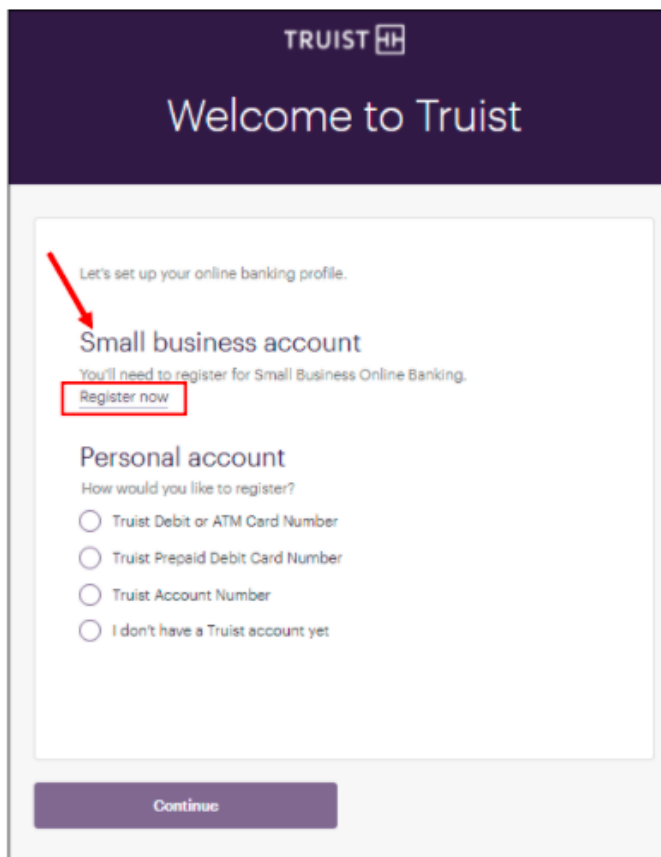


## Enroll in Truist online banking for business accounts

1. Click 'Enroll Now' below the Online Banking Sign In section on truist.com.

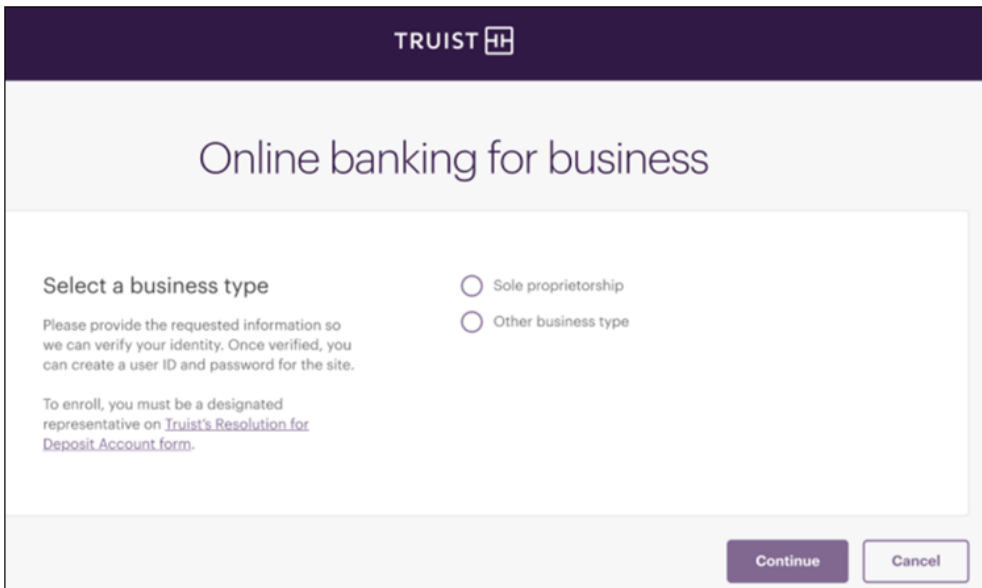


2. On the Welcome to Truist screen, click on 'Register Now' under Small business account.



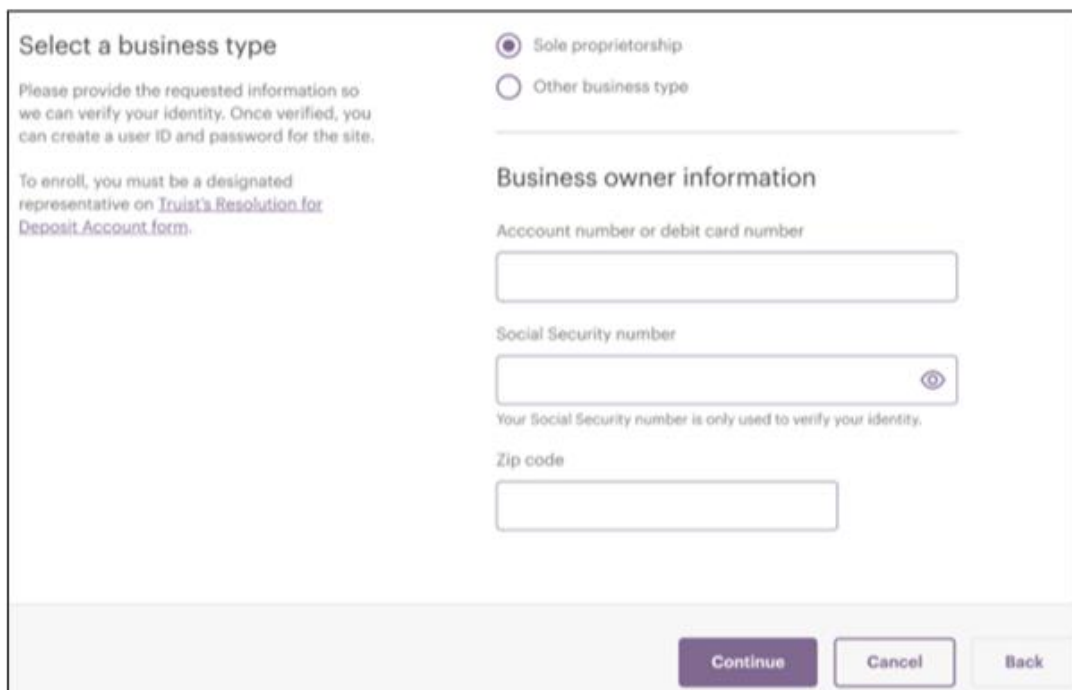


3. Select the business type and then click 'Continue'.



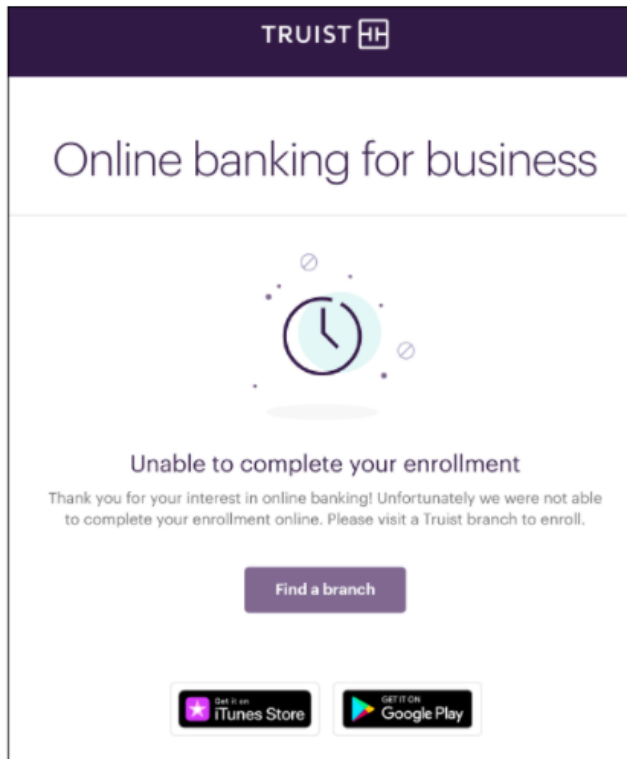
The screenshot shows the 'Online banking for business' selection screen. At the top is the TRUIST logo. Below it, the title 'Online banking for business' is centered. The main section is titled 'Select a business type' and includes instructions: 'Please provide the requested information so we can verify your identity. Once verified, you can create a user ID and password for the site.' It also states: 'To enroll, you must be a designated representative on [Truist's Resolution for Deposit Account form](#).' There are two radio button options: 'Sole proprietorship' and 'Other business type'. At the bottom right are 'Continue' and 'Cancel' buttons.

4. If 'Sole Proprietorship' is selected, complete the following:
  - a. Type in the business account or debit card number, Social Security Number of the designated representative, and zip code (for the business owner or designated representative) and then click **Continue**.



The screenshot shows the 'Business owner information' form. It is titled 'Select a business type' and includes the same instructions as the previous screen. The 'Sole proprietorship' radio button is selected. Below the instructions is the 'Business owner information' section, which contains three input fields: 'Account number or debit card number', 'Social Security number' (with a toggle icon), and 'Zip code'. A note below the Social Security number field states: 'Your Social Security number is only used to verify your identity.' At the bottom right are 'Continue', 'Cancel', and 'Back' buttons.

- b. If the business relationship is validated, proceed to step C. If we're unable to validate the business relationship, you'll need to visit a branch to enroll.



- c. Enter the phone number and email address where communications from Truist should be sent and then click **Continue**.

A screenshot of a mobile app interface for Truist, showing a contact information form. The header is light gray with the text 'Online banking for business'. Below the header, the title 'Contact information' is followed by a paragraph: 'Please provide the requested information so we can verify your identity. Once verified, you can create a user ID and password for the site.' To the right of this text are three input fields: 'Phone number', 'Email' (with an envelope icon), and 'Confirm email' (also with an envelope icon). Below the input fields are three buttons: 'Continue' (purple), 'Cancel' (light gray), and 'Back' (light gray).

- d. A list of questions to verify identity will be presented. Click on the applicable response to each question and then click 'Continue'.
- e. If we're unable to verify the business relationship, you'll need to visit a branch to enroll.

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

- f. Create a User ID and Password following the rules listed below and confirm password. Click 'Continue' when completed.

The screenshot shows a web form titled "Online banking for business" with the subtitle "User ID & password". Below the subtitle is the instruction "Create a new user ID and password." The form contains three main sections: a "User ID" input field with the placeholder text "HereisaNewUser"; a "User ID rules" box listing four rules: "8 to 20 characters with no spaces" (checked), "Acceptable symbols: !@#\$%^&\*~`~'~\"{ } ~" (checked), "Can't match the user's email address" (checked), and "Can't use an existing user ID" (unchecked); a "Password" input field with masked characters "\*\*\*\*\*"; a "Password rules" box listing five rules: "8 to 20 characters with no spaces" (checked), "At least 3 of the 4: Uppercase letter, Lowercase letter, Number, Symbol !@%{ } ~ ; : @ , \$ %" (checked), "Can't repeat character more than twice in a row" (checked), "Can't use current ID" (unchecked), and "Tip for creating a strong password" (unchecked); and a "Confirm password" input field with masked characters "\*\*\*\*\*". At the bottom right are three buttons: "Continue" (highlighted in purple), "Cancel", and "Back".

- g. "You're ready to sign in" message displays; click on 'Sign in to Trusti'.

The screenshot shows a web page titled "Online banking for business". In the center is a large circular icon with a checkmark inside, surrounded by small plus signs. Below the icon is the text "Let's go" and "You're ready to sign in with your new Trusti user ID and password." Below this is a box containing "User ID: HereisaNewUser". Underneath is a purple button labeled "Sign in to Trusti". At the bottom are two logos: "Get it on iTunes Store" and "GET IT ON Google Play".

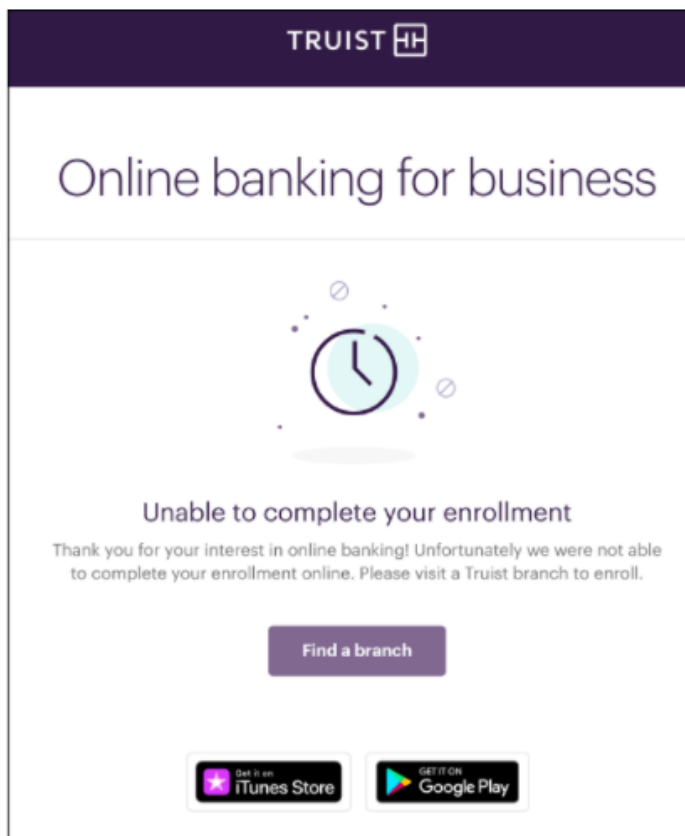
5. If 'Other business type' is selected, complete the following.

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

- h. Enter the business account or debit card number, Tax ID number, and zip code and then click **Continue**.

The screenshot shows a web form titled "Select a business type". It includes instructions: "Please provide the requested information so we can verify your identity. Once verified, you can create a user ID and password for the site." and "To enroll, you must be a designated representative on [Truist's Resolution for Deposit Account form](#)." The form has two radio buttons for "Sole proprietorship" and "Other business type" (which is selected). Below are input fields for "Account number or debit card number", "Tax ID number" (with a toggle icon), and "Zip code". A note states "Your Tax ID number is only used to verify your identity." At the bottom are "Continue", "Cancel", and "Back" buttons.

- i. If the business relationship is validated, proceed to step C. If we're unable to validate the business relationship, you'll need to visit a branch to enroll.



- j. Enter all requested information on the business owner (designated representative) including name, SSN, DOB, driver's license number, address, phone number, and email address. Click **Continue**.

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

### Online banking for business

#### User information

Enjoy instant access to your accounts, including bill payment, transfers, ACH payments and wire transfers. Set and manage account access level for partners and employees.

Please provide the requested information so we can verify your identity. Once verified, you can create a user ID and password for the site.

#### Business owner information

First name

MI (Optional)

Last name

Suffix (Optional)

Social Security

Date of birth

Your social security number will be used to verify your identity.

Example: mmdd/yyyy

Driver license number

State issued

Street address

Apt, suite, PO box

City

Zip code

State

Phone number

Email

This is the email address Trust has on file to send electronic communications.

Confirm email

Continue

Cancel

Back

- k. A list of questions to verify identity will be presented. Click on the applicable response to each question and then click 'Continue'.
- l. If we're unable to verify the business relationship, you'll need to visit a branch to enroll.

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

- m. Create a User ID and Password following the rules listed below and confirm password. Click 'Continue' when completed.

Online banking for business

User ID & password  
Create a new user ID and password.

User ID  
HereisaNewUser

User ID rules

- 8 to 20 characters with no spaces
- Acceptable symbols (P, S, &, -, +, \*, '(), -, Can't match the user's email address
- Can't use an existing user ID

Password  
\*\*\*\*\*

Password rules

- 8 to 20 characters with no spaces
- At least 3 of the 4:
  - Uppercase letter
  - Lowercase letter
  - Number
  - Symbol (P, S, &, -, +, \*, '(), -, Can't repeat character more than twice in a row
- Can't use current ID
- Tip for creating a strong password

Confirm password  
\*\*\*\*\*

Continue Cancel Back

- n. "You're ready to sign in" message displays; click on 'Sign in to Truist'.

Online banking for business

Let's go

You're ready to sign in with your new Truist user ID and password.

User ID: HereisaNewUser

Sign in to Truist

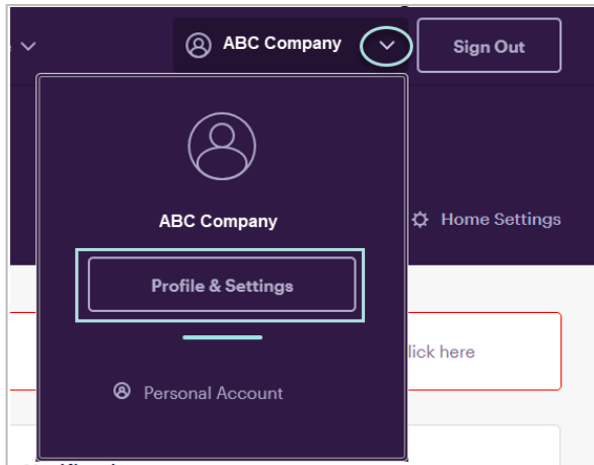
Get it on the iTunes Store GET IT ON Google Play

[Back to top of the document](#)

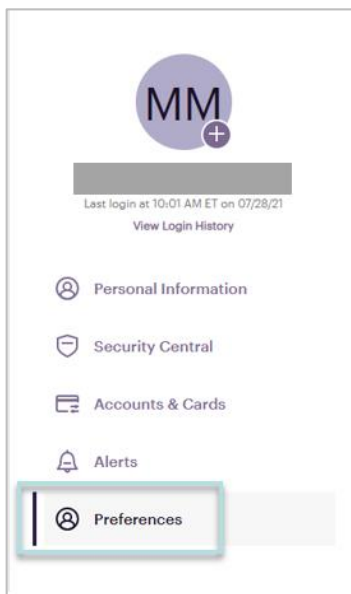
## Subscribing to Direct Connect

To subscribe to Direct Connect:

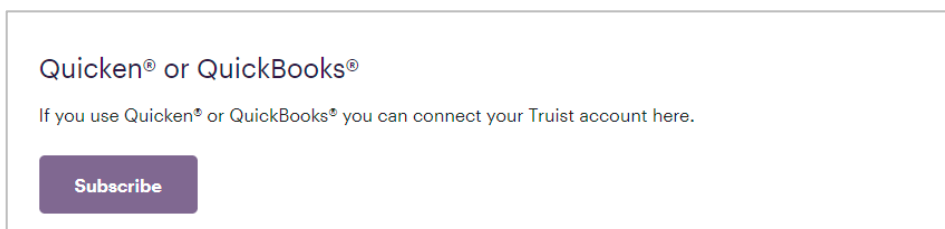
1. From the Online Banking profile drop down, click **Profile & Settings**.



2. Click **Preferences**.



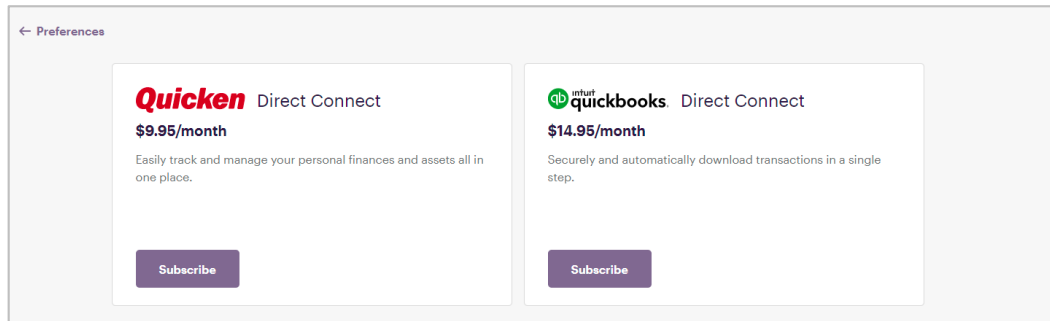
3. Click **Subscribe** in the *Quicken®* or *QuickBooks®* section.



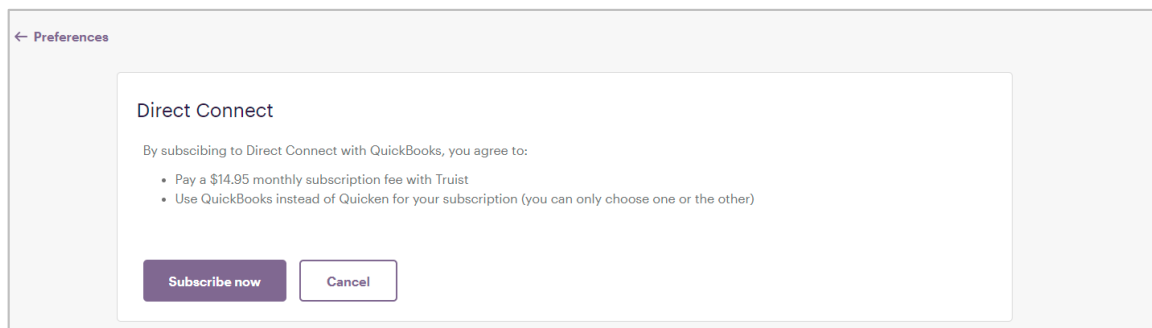


## Online and Mobile Banking: Getting Started with Direct Connect

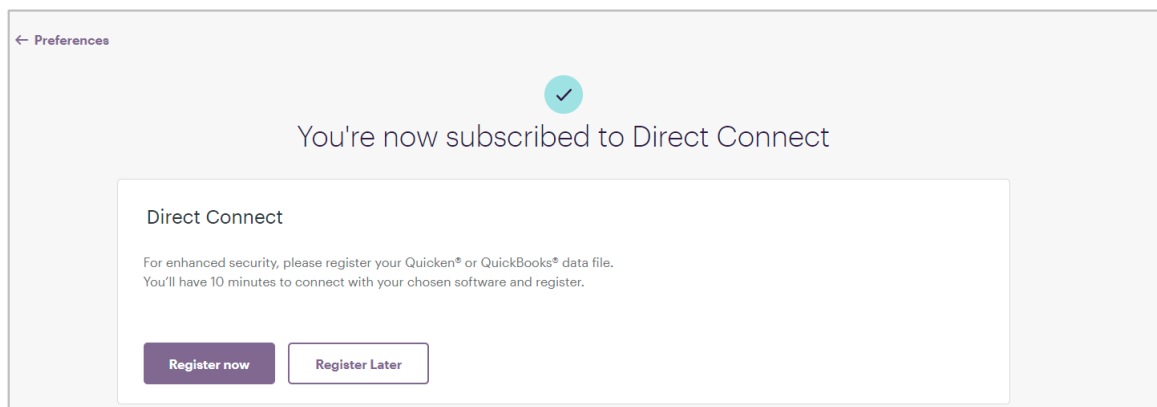
4. Click the **Subscribe** button for the service you want to use.



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



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.



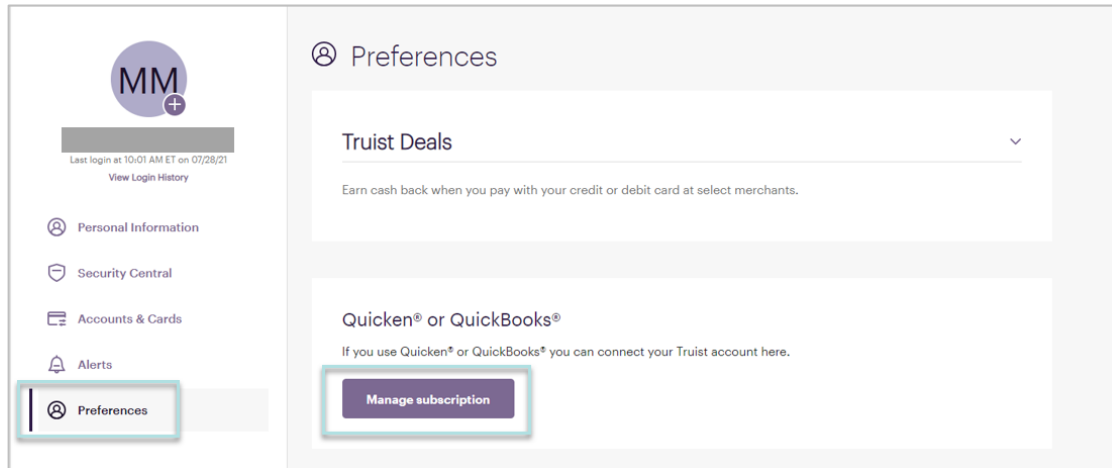
[Back to top of the document](#)

### Registering a data file for Quicken - Windows

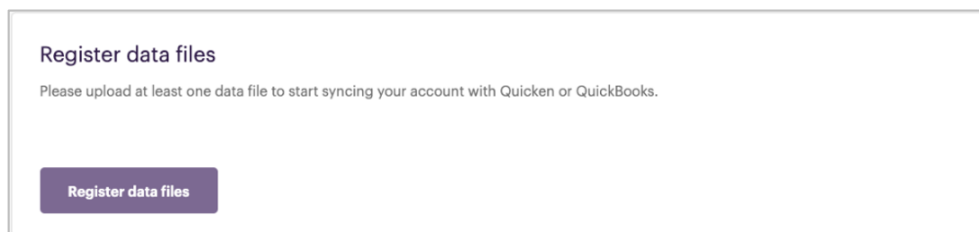
You can register a data file immediately after subscribing to the Direct Connect service (continuation of the steps in *Subscribing to Direct Connect*) or return to **Profile & Settings > Preferences** when you are registering the file at a later time.

To register a data file for Quicken:

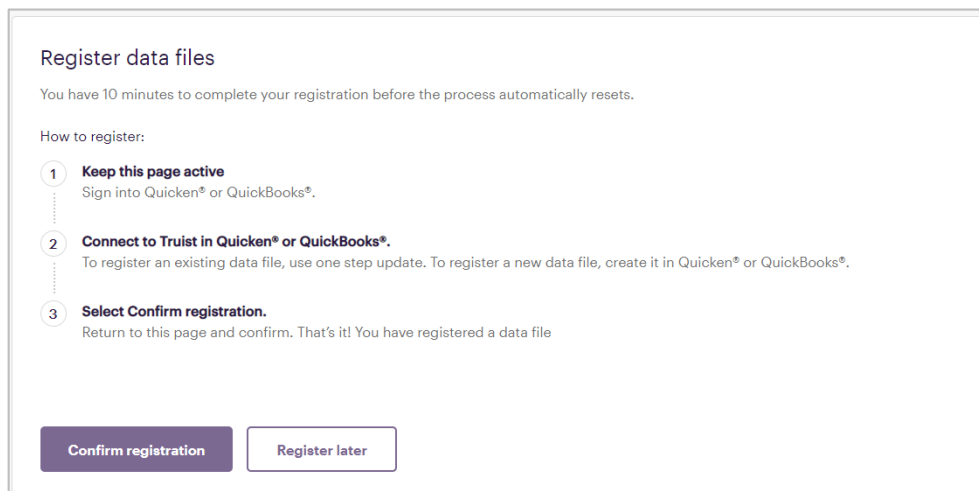
1. In the Preferences *Quicken®* or *QuickBooks®* section, click **Manage subscription**.



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 Online Services Tab, then select Set Up Now.

The 'Account Details' window shows the 'Online Services' tab. The 'General' tab is also visible. The 'Online Services' section is highlighted with a red circle. It contains fields for 'Account name', 'Description', 'Account type', 'Tax deferred', 'Interest rate', 'Financial institution', 'Account Number', 'Routing Number', 'Customer ID', 'Contact name', 'Phone', 'Home page', 'Activity page', 'Other page', and 'Comments'. The 'Set up alerts' section has 'Max. Balance' and 'Min. Balance' fields. The 'Delete Account' and 'Tax Schedule' buttons are at the bottom left, and 'OK' and 'Cancel' buttons are at the bottom right.

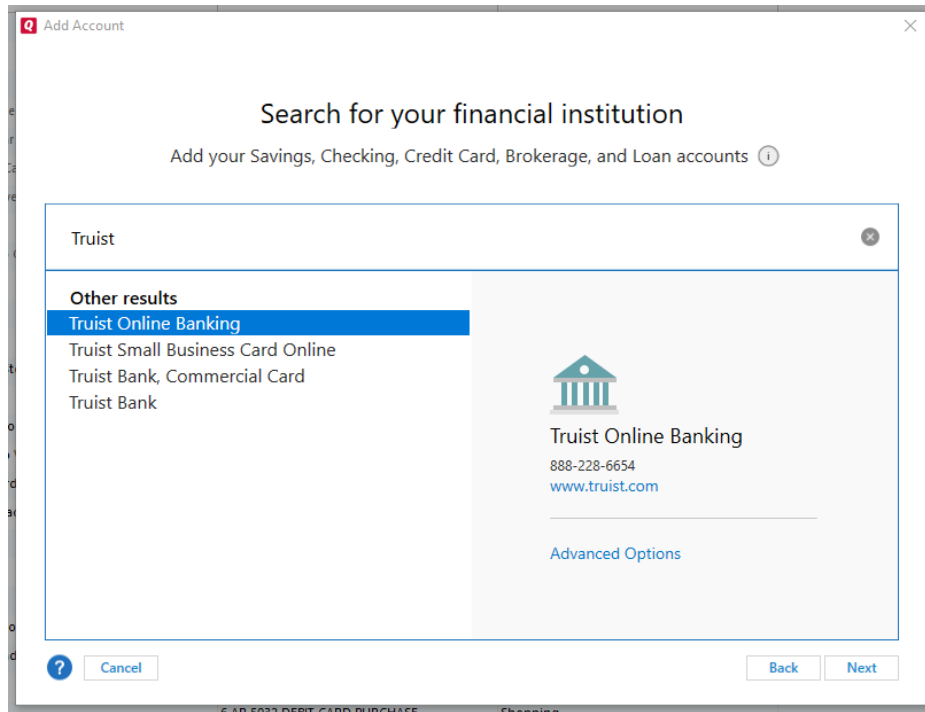
The 'Account Details' window shows the 'Online Services' tab. The 'Online setup' section is highlighted with a red circle. It contains a 'Download transactions directly from your financial institution.' button with a 'Set up Now...' link. The 'Online bill payment' section contains a 'Pay your bills online without leaving Quicken.' button with a 'Set up Now...' link. The 'Delete Account' and 'Tax Schedule' buttons are at the bottom left, and 'OK' and 'Cancel' buttons are at the bottom right.

- Select Advance Setup

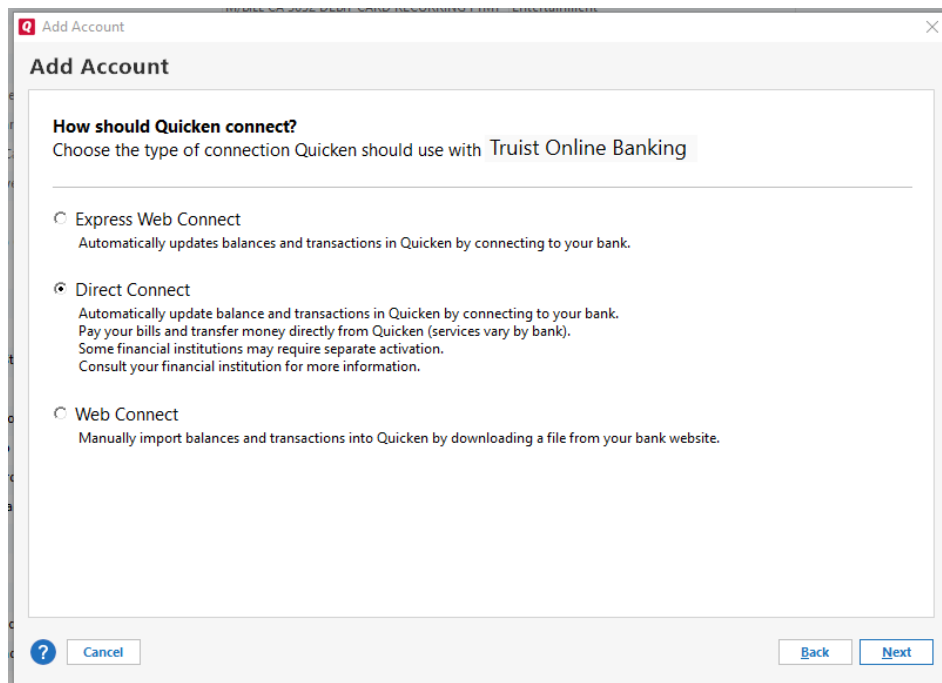
The 'Add Checking Account' window shows the 'Enter the name of your financial institution' section. It contains a search bar and a list of popular financial institutions. The 'Advanced Setup' link is highlighted with a red circle. The 'Financial Institution not on the list? Prefer not to download? Use Advanced Setup to create your account.' text is also visible. The 'Cancel' button is at the bottom left, and 'Back' and 'Next' buttons are at the bottom right.

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

7. Select the radio button next to I want to select the connection method used to download my transactions. Enter Truist Online Banking for the name of the financial institution.



8. You are asked how Quicken should connect. Select **Direct Connect** and click **Continue**.



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

9. You are prompted to enter your online banking User ID and Password. Enter the information and click **Continue**.

[illegible]

10. You should see the Accounts Added screen. You can click **Finished**.

11. You should see all of the accounts and transactions under that User ID that are eligible for Direct Connect in Quicken.

Quicken Premier - Test File 9-1-2020 Direct Connect - [Checking 13400972452]

File Edit View Tools Mobile & Web Reports Help

ACCOUNTS +

HOME SPENDING BILLS & INCOME PLANNING INVESTING PROPERTY & DEBT ADD-ON SERVICES MOBILE & WEB TIPS & TUTORIALS

All Transactions

Checking - \$18,112.21

Last download September 1, 2020 - 7:01 pm (Direct Connect)

All Dates Any Type All Transactions Reset

Search

Date	Check	Payee	Memo	Category	Payment	Deposit	Amount	Balance
6/19/2020							-324.32	520.05
6/22/2020							-195.00	325.05
6/24/2020		INT				0.01	0.01	325.06
6/29/2020					500.00	500.00	825.06	
6/29/2020							-560.80	264.26
6/30/2020					100.00	100.00	364.26	
7/6/2020							-120.00	244.26
7/7/2020							-100.00	144.26
7/15/2020					100.00	100.00	244.26	
7/23/2020					40.00	40.00	204.26	
7/23/2020					50.00	50.00	154.26	
7/23/2020							-90.00	64.26
7/23/2020							-120.35	123.91
7/31/2020					100.00	100.00	223.91	
8/4/2020					1.00	1.00	224.91	
8/14/2020					100.00	100.00	124.91	
8/17/2020							-79.87	44.04
8/18/2020						1,934.17	1,934.17	2,180.21
8/20/2020							-88.30	2,091.91
8/20/2020							-1,933.79	148.12
8/31/2020					100.00	100.00	248.12	
8/31/2020					260.00	260.00	508.12	
8/31/2020					260.00	260.00	768.12	
8/31/2020							-100.00	668.12
8/31/2020		ATM					-260.00	408.12
8/31/2020							-260.00	148.12

Net Worth - \$18,112.21

Credit Score View...

221 Transactions

Online Balance: 148.12

Ending Balance: 148.12

12. 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 Quicken is complete.

Register data files

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

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

Register data files

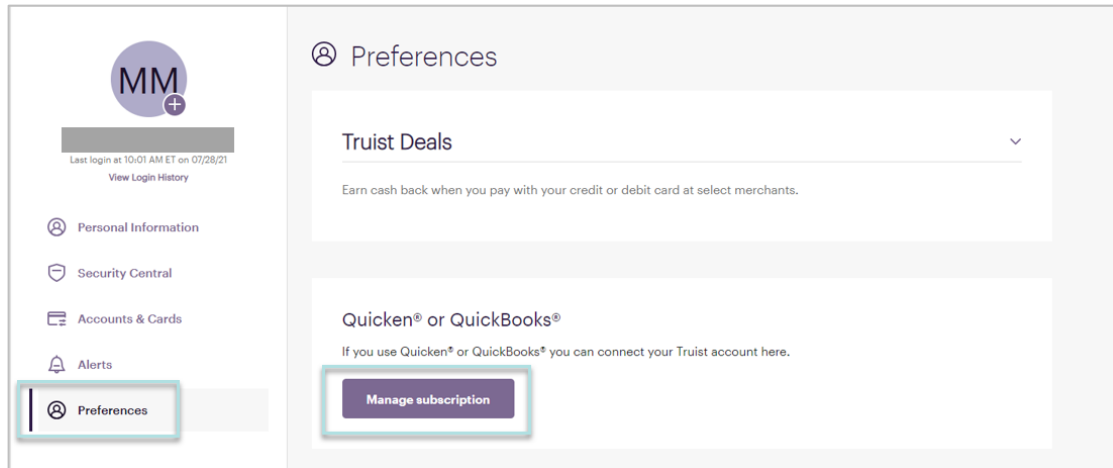
[Back to top of the document](#)

## Registering a data file for Quicken - Mac

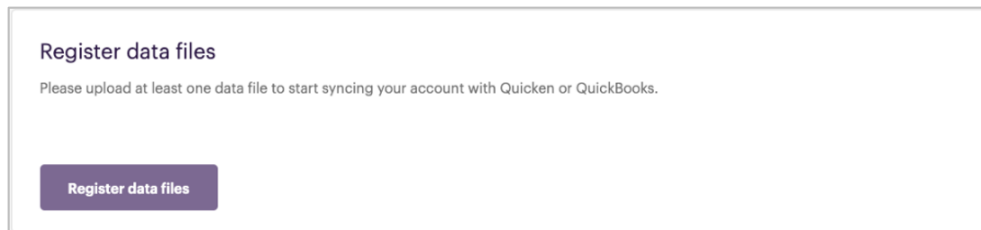
You can register a data file immediately after subscribing to the Direct Connect service (continuation of the steps in *Subscribing to Direct Connect*) or return to **Profile & Settings > Preferences** when you are registering the file at a later time.

To register a data file for Quicken:

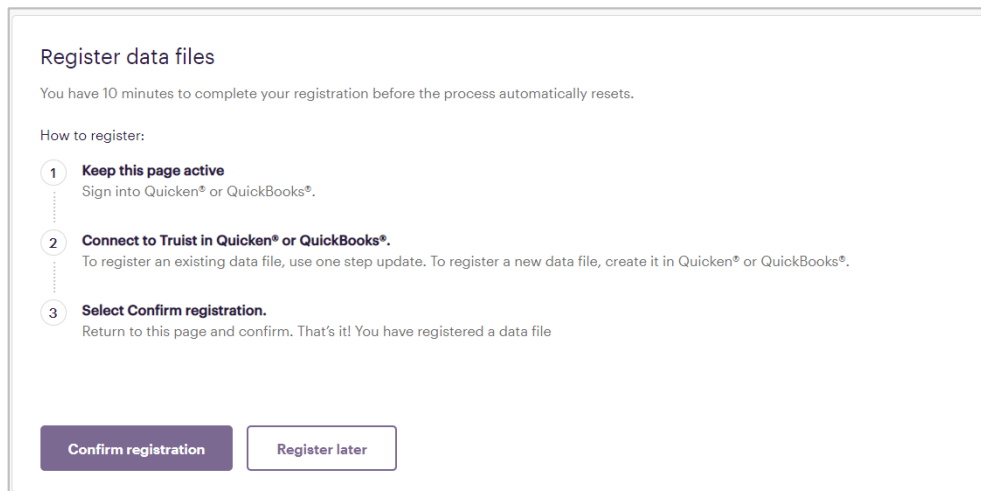
1. In the Preferences *Quicken®* or *QuickBooks®* section, click **Manage subscription**.



2. Click **Register data files**.



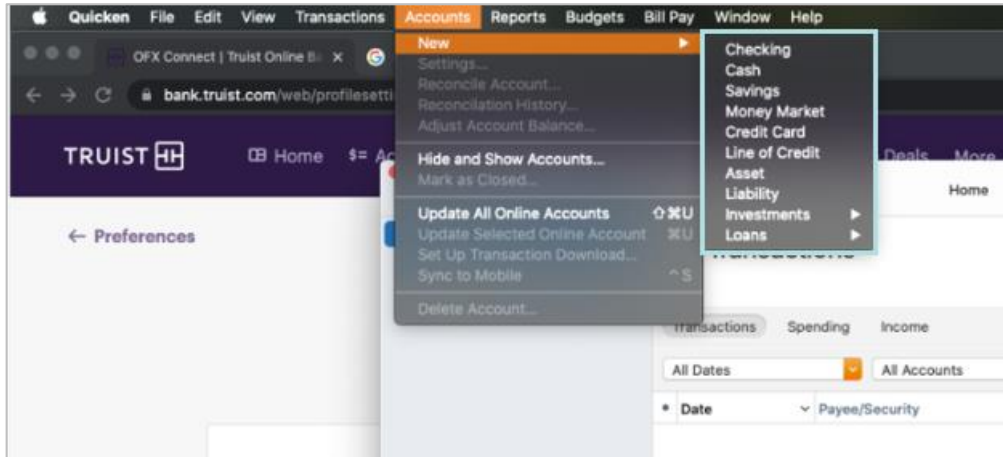
3. From Truist Online Banking, make sure the Register data files page is active.



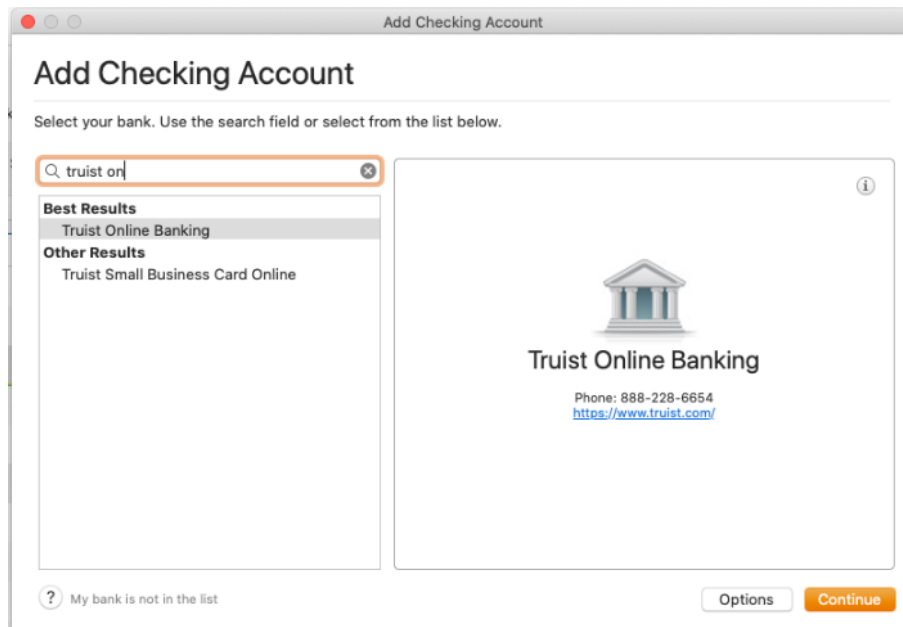


## Online and Mobile Banking: Getting Started with Direct Connect

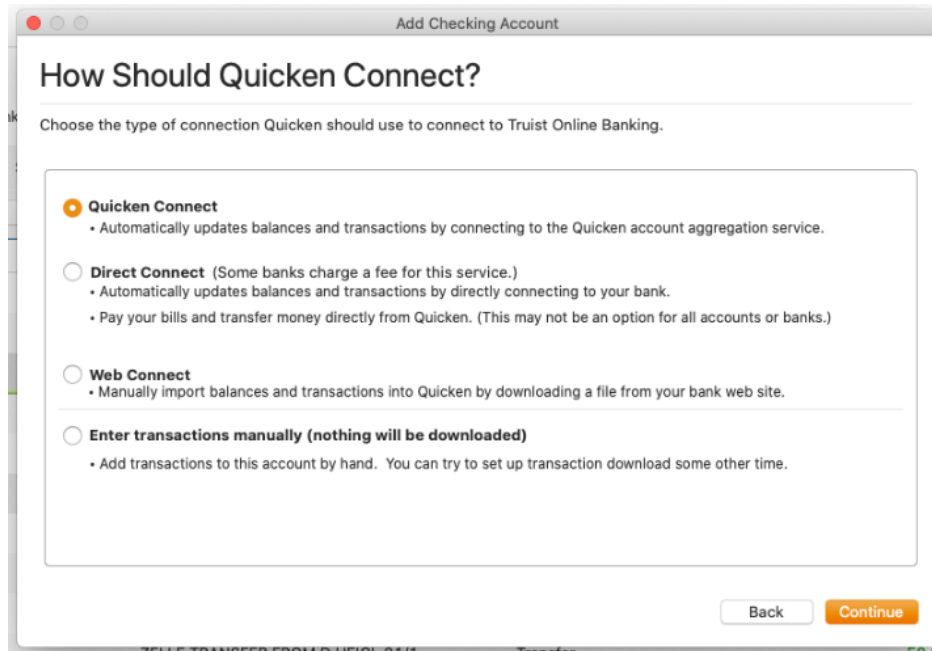
- Log in to your desktop version of Quicken.  
**Note:** Your Quicken screens may differ depending on the version of Quicken you use.
- Select **Accounts > New > [account type]**. (In this example, we select Checking.)



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



7. You are asked how Quicken should connect. Select **Direct Connect** and click **Continue**.

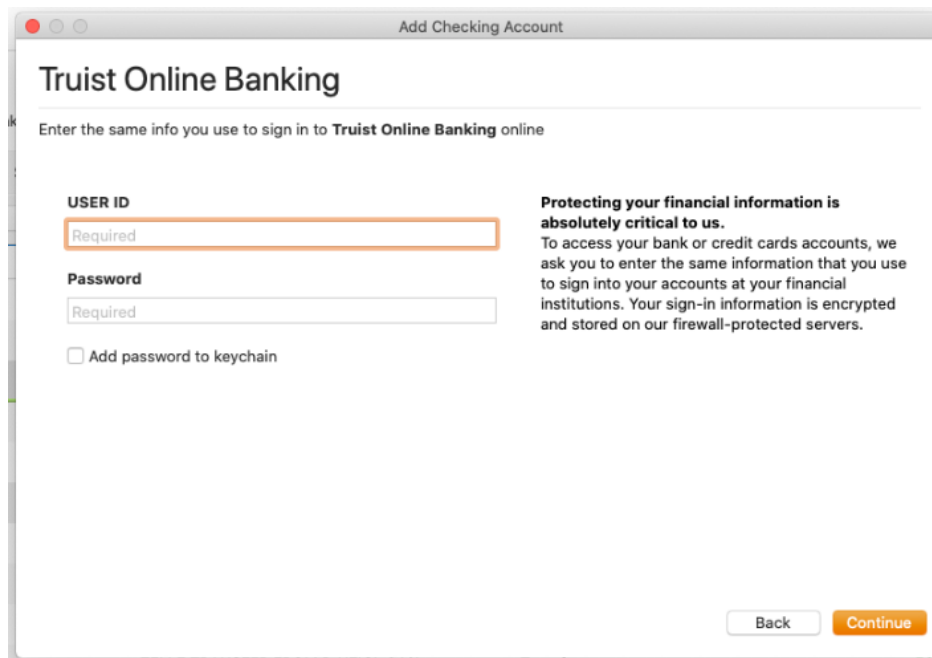


The screenshot shows a window titled "Add Checking Account" with a sub-header "How Should Quicken Connect?". Below the header, it says "Choose the type of connection Quicken should use to connect to Truist Online Banking." There are four radio button options:

- ☒ **Quicken Connect**
  - Automatically updates balances and transactions by connecting to the Quicken account aggregation service.
- ☐ **Direct Connect** (Some banks charge a fee for this service.)
  - Automatically updates balances and transactions by directly connecting to your bank.
  - Pay your bills and transfer money directly from Quicken. (This may not be an option for all accounts or banks.)
- ☐ **Web Connect**
  - Manually import balances and transactions into Quicken by downloading a file from your bank web site.
- ☐ **Enter transactions manually (nothing will be downloaded)**
  - Add transactions to this account by hand. You can try to set up transaction download some other time.

At the bottom right, there are "Back" and "Continue" buttons.

8. You are prompted to enter your online banking User ID and Password. Enter the information and click **Continue**.



The screenshot shows a window titled "Add Checking Account" with a sub-header "Truist Online Banking". Below the header, it says "Enter the same info you use to sign in to Truist Online Banking online". There are two input fields:

- USER ID**: A text box with "Required" placeholder text.
- Password**: A text box with "Required" placeholder text.

Below the password field, there is a checkbox labeled "Add password to keychain". To the right of the input fields, there is a security notice:

**Protecting your financial information is absolutely critical to us.**  
To access your bank or credit cards accounts, we ask you to enter the same information that you use to sign into your accounts at your financial institutions. Your sign-in information is encrypted and stored on our firewall-protected servers.

At the bottom right, there are "Back" and "Continue" buttons.

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

Q

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**.

### 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 Truist 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 registrationRegister later

Your data file registration with Quicken is complete.

### Register data files

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

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

Register data files

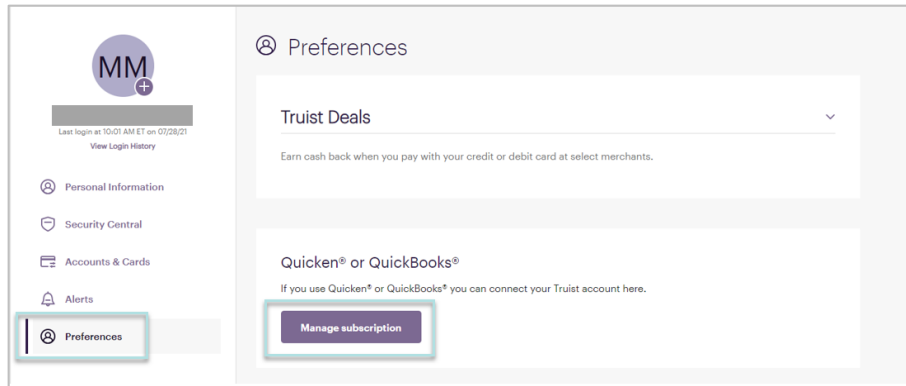
[Back to top of the document](#)

## Registering a data file for QuickBooks - Windows

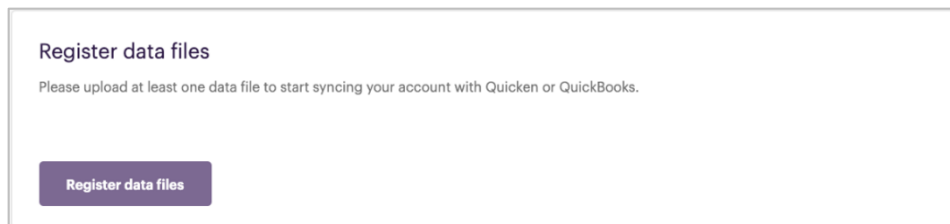
You can register a data file immediately after subscribing to the Direct Connect service (continuation of the steps above) or return to **Profile & Settings > Preferences** when you are registering the files at a later time.

To register a data file for QuickBooks:

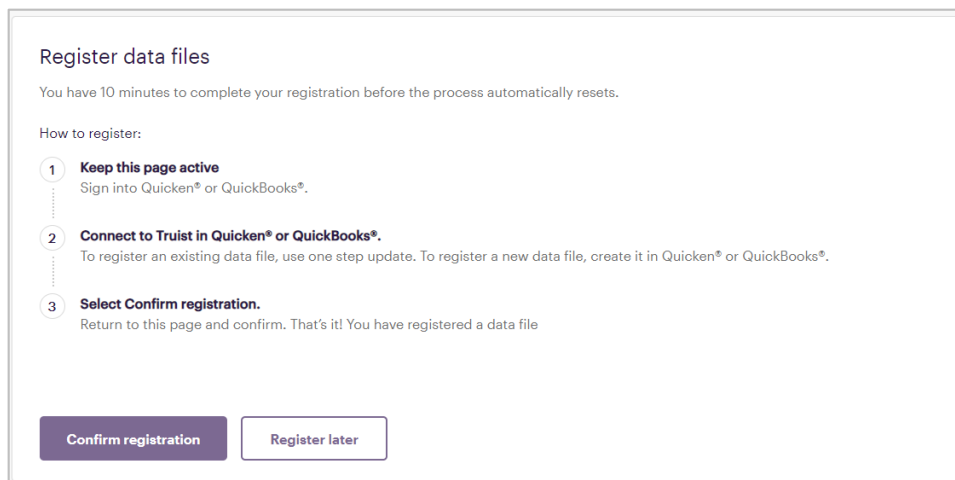
1. In the Preferences *Quicken®* or *QuickBooks®* section, click **Manage subscription**.



2. Click **Register data files**.



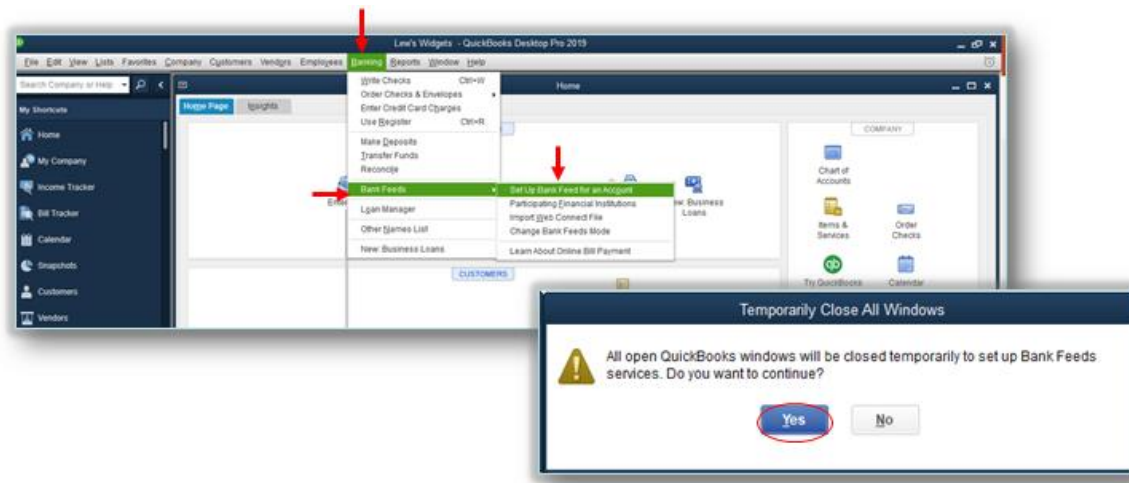
3. The *Register data files* page is displays. Keep this page active as you proceed with the following steps.



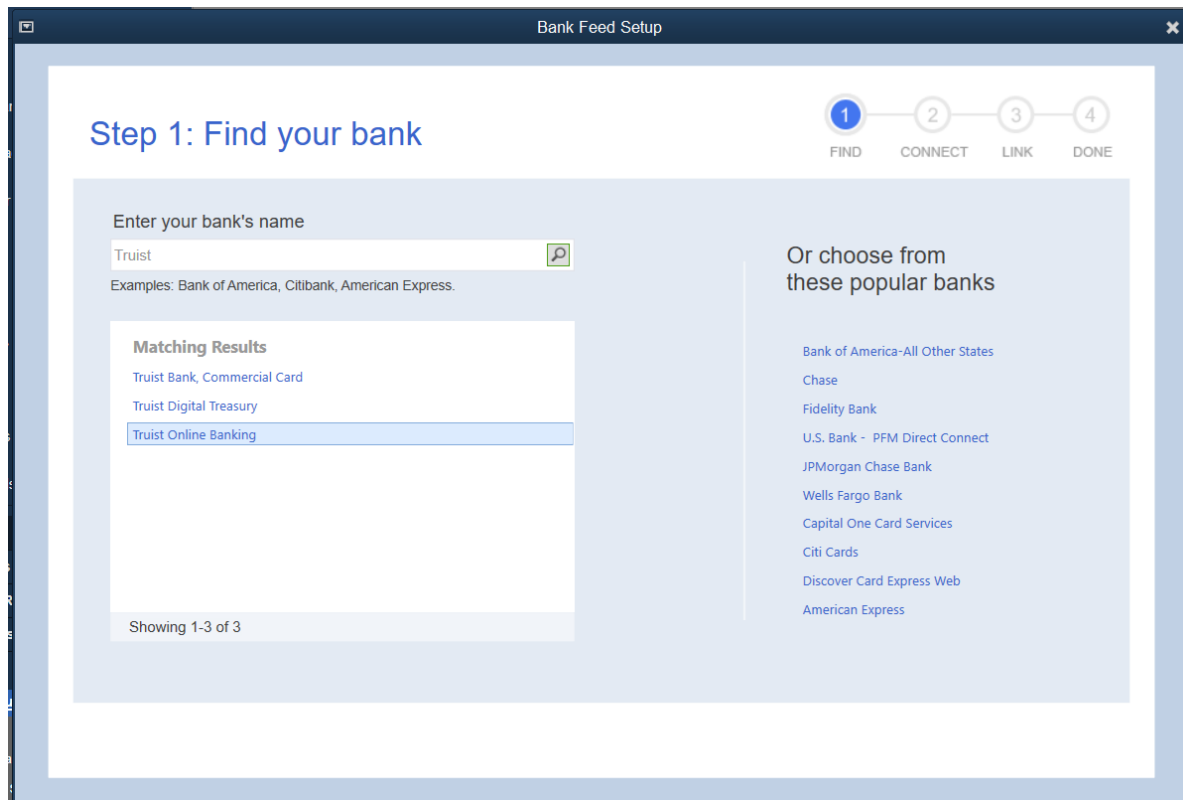
4. Log in to your desktop version of QuickBooks.  
**Note:** Your QuickBooks screens may differ depending on the version of QuickBooks you use.

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

5. In the Menu Bar, click **Banking**, **Bank Feeds**, then **Set Up Bank Feed for an Account**. A small pop-up advising that all windows will be closed will populate. Click **Yes**.

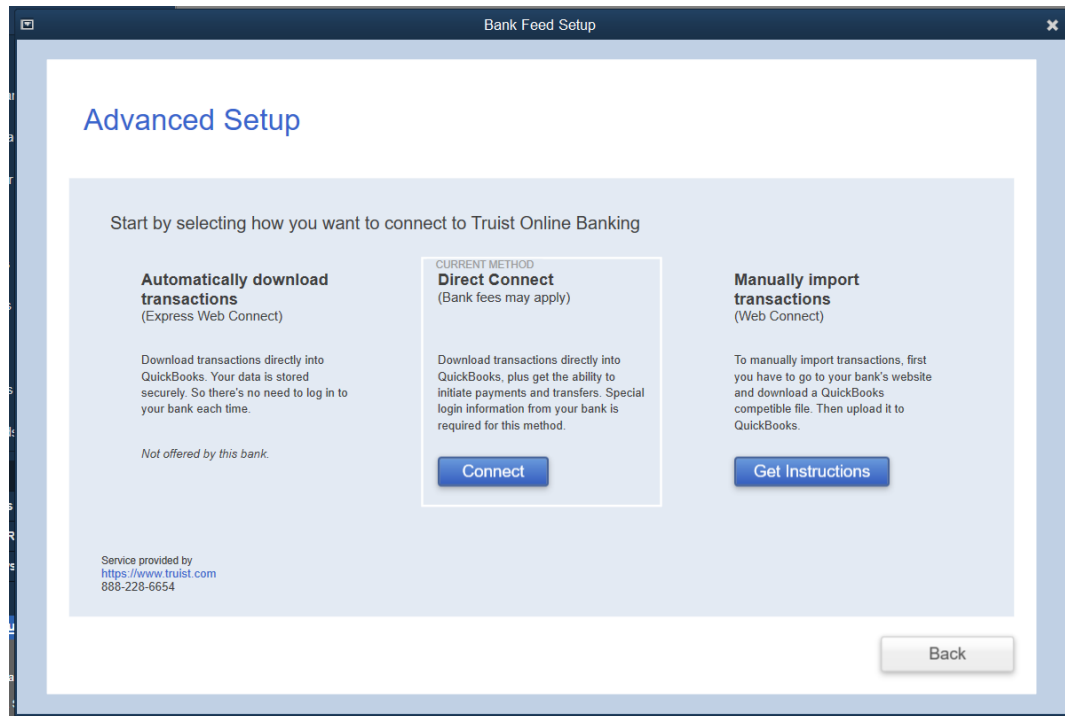


6. From the Online Banking Assistant, search for and select **Truist - Online Banking** as your financial institution. Click **Next**.



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

### 7. Select **Direct Connect** and then **Connect**



The screenshot shows the 'Bank Feed Setup' window with the 'Advanced Setup' tab selected. The main heading is 'Advanced Setup'. Below it, a sub-heading reads 'Start by selecting how you want to connect to Truist Online Banking'. There are three options: 'Automatically download transactions (Express Web Connect)', 'Direct Connect (Bank fees may apply)' (labeled as the 'CURRENT METHOD'), and 'Manually import transactions (Web Connect)'. The 'Direct Connect' option is highlighted with a blue border and a 'Connect' button. The 'Manually import transactions' option has a 'Get Instructions' button. A 'Back' button is at the bottom right. A footer note states 'Service provided by https://www.truist.com 888-228-6654'.

**Bank Feed Setup**

### Advanced Setup

Start by selecting how you want to connect to Truist Online Banking

**Automatically download transactions**  
(Express Web Connect)

Download transactions directly into QuickBooks. Your data is stored securely. So there's no need to log in to your bank each time.

*Not offered by this bank.*

CURRENT METHOD  
**Direct Connect**  
(Bank fees may apply)

Download transactions directly into QuickBooks, plus get the ability to initiate payments and transfers. Special login information from your bank is required for this method.

**Connect**

**Manually import transactions**  
(Web Connect)

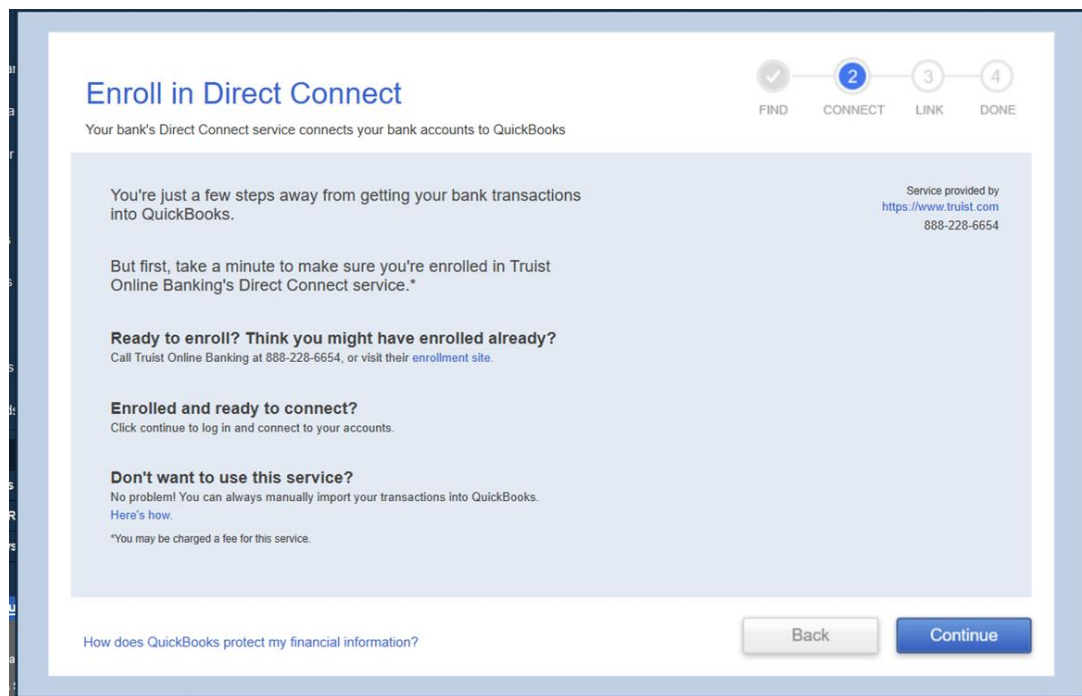
To manually import transactions, first you have to go to your bank's website and download a QuickBooks compatible file. Then upload it to QuickBooks.

**Get Instructions**

Service provided by  
<https://www.truist.com>  
888-228-6654

**Back**

### 8. Select **Continue**



The screenshot shows the 'Enroll in Direct Connect' screen. At the top right, a progress bar shows four steps: 1. FIND (checked), 2. CONNECT (active), 3. LINK, and 4. DONE. The main heading is 'Enroll in Direct Connect'. Below it, a sub-heading reads 'Your bank's Direct Connect service connects your bank accounts to QuickBooks'. The main text says 'You're just a few steps away from getting your bank transactions into QuickBooks.' and 'But first, take a minute to make sure you're enrolled in Truist Online Banking's Direct Connect service.\*'. There are three sections: 'Ready to enroll? Think you might have enrolled already?' with a link to the enrollment site, 'Enrolled and ready to connect?' with a 'Continue' button, and 'Don't want to use this service?' with a link to manual import instructions. A footer note states 'Service provided by https://www.truist.com 888-228-6654'. A 'Back' button and a 'Continue' button are at the bottom right. A footer note at the bottom left asks 'How does QuickBooks protect my financial information?'.

### Enroll in Direct Connect

1 2 3 4  
FIND CONNECT LINK DONE

Your bank's Direct Connect service connects your bank accounts to QuickBooks

You're just a few steps away from getting your bank transactions into QuickBooks.

But first, take a minute to make sure you're enrolled in Truist Online Banking's Direct Connect service.\*

**Ready to enroll? Think you might have enrolled already?**  
Call Truist Online Banking at 888-228-6654, or visit their [enrollment site](#).

**Enrolled and ready to connect?**  
Click continue to log in and connect to your accounts.

**Don't want to use this service?**  
No problem! You can always manually import your transactions into QuickBooks.  
[Here's how.](#)

\*You may be charged a fee for this service.

Service provided by  
<https://www.truist.com>  
888-228-6654

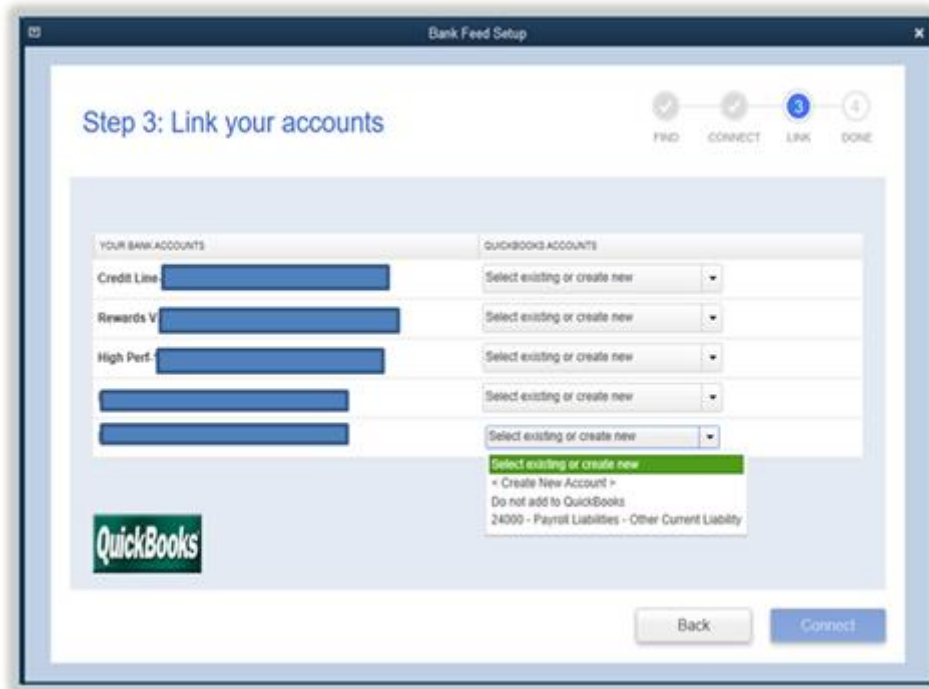
How does QuickBooks protect my financial information?

**Back** **Continue**



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

9. Enter your Truist online banking **User ID** and **Password**, confirm your password and click **Connect**.
10. 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 **Connect**.



11. A conformation message displays. Click **Done**.
12. 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 Truist 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 registrationRegister 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

[Back to top of the document](#)

### Registering a data file for QuickBooks - Mac

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**.

Last login at 10:01 AM ET on 07/28/21  
[View Login History](#)

- Personal Information
- Security Central
- Accounts & Cards
- Alerts
- Preferences**

### Preferences

**Truist Deals**

Earn cash back when you pay with your credit or debit card at select merchants.

**Quicken® or QuickBooks®**  
If you use Quicken® or QuickBooks® you can connect your Truist account here.

Manage subscription

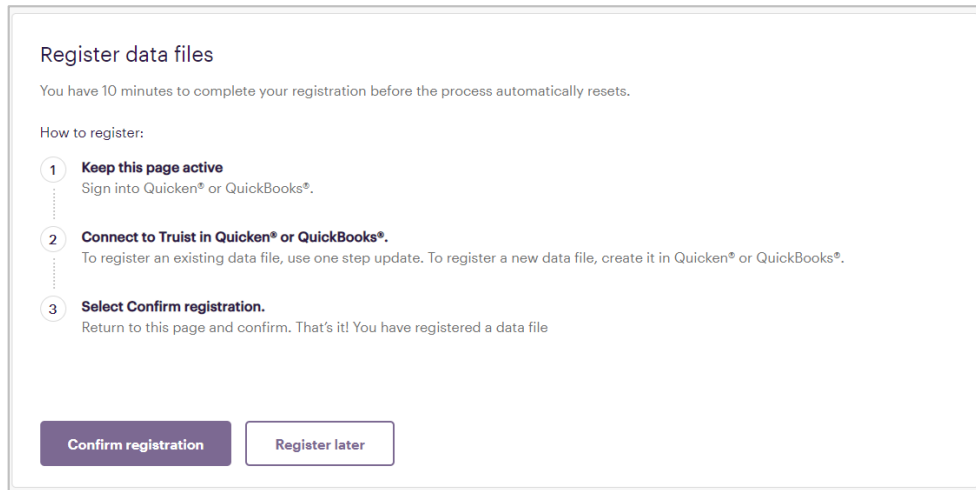
2. Click **Register data files**.

### Register data files

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

Register data files

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



The screenshot shows the 'Register data files' page. At the top, it says 'You have 10 minutes to complete your registration before the process automatically resets.' Below this, it says 'How to register:' followed by three numbered steps: 1. 'Keep this page active' with subtext 'Sign into Quicken® or QuickBooks®.' 2. 'Connect to Truist in Quicken® or QuickBooks®.' with subtext '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.' with subtext 'Return to this page and confirm. That's it! You have registered a data file'. At the bottom, there are two buttons: 'Confirm registration' and 'Register later'.

**Register data files**

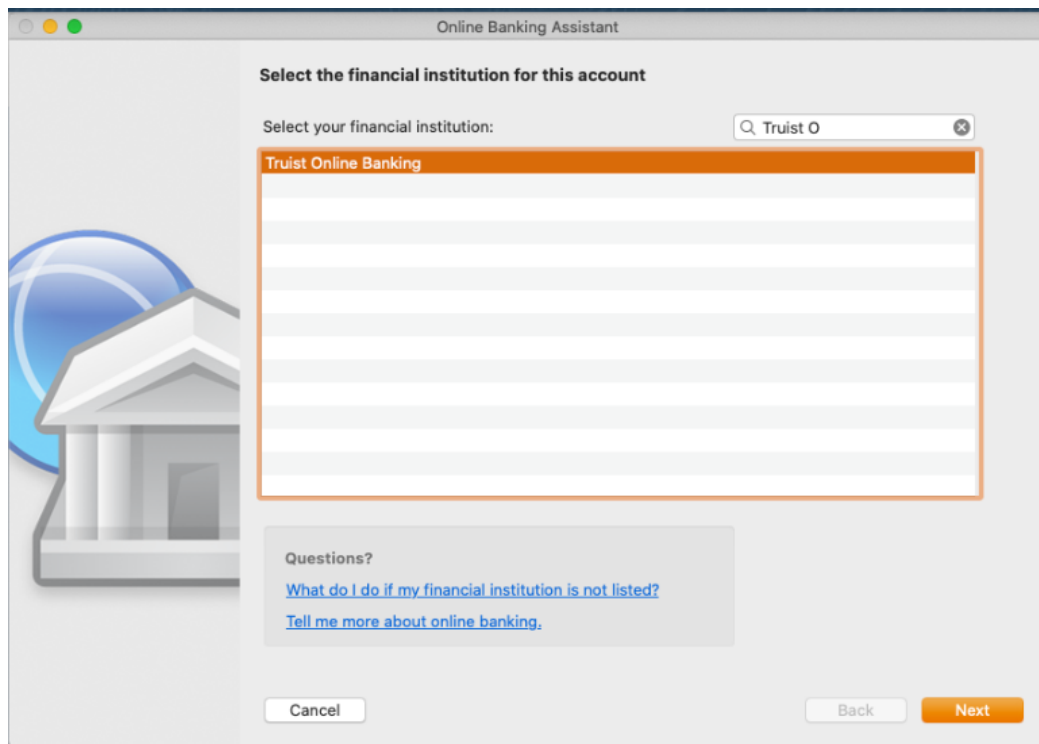
You have 10 minutes to complete your registration before the process automatically resets.

How to register:

- 1 Keep this page active**  
Sign into Quicken® or QuickBooks®.
- 2 Connect to Truist 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**

4. Log in to your desktop version of QuickBooks.  
**Note:** Your QuickBooks screens may differ depending on the version of QuickBooks you use.
5. From the Online Banking Assistant, search for and select **Truist - Online Banking** as your financial institution. Click **Next**.



The screenshot shows the 'Online Banking Assistant' window. The title bar says 'Online Banking Assistant'. The main heading is 'Select the financial institution for this account'. Below this, it says 'Select your financial institution:' followed by a search bar containing 'Truist O'. A dropdown menu is open, showing 'Truist Online Banking' as the selected option. Below the dropdown, there are several empty rows. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'. To the left of the buttons, there is a 'Questions?' section with two links: 'What do I do if my financial institution is not listed?' and 'Tell me more about online banking.'.

**Online Banking Assistant**

**Select the financial institution for this account**

Select your financial institution:

**Truist Online Banking**

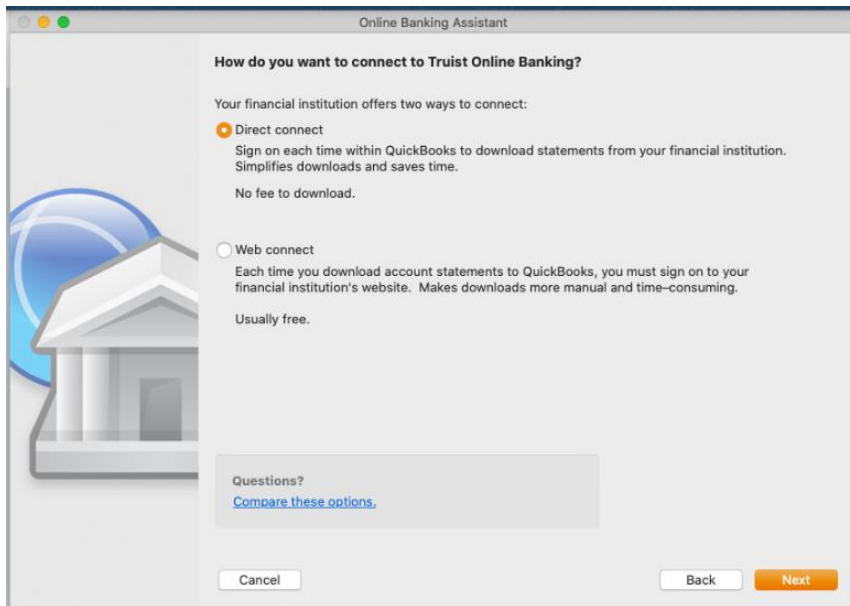
**Questions?**

[What do I do if my financial institution is not listed?](#)

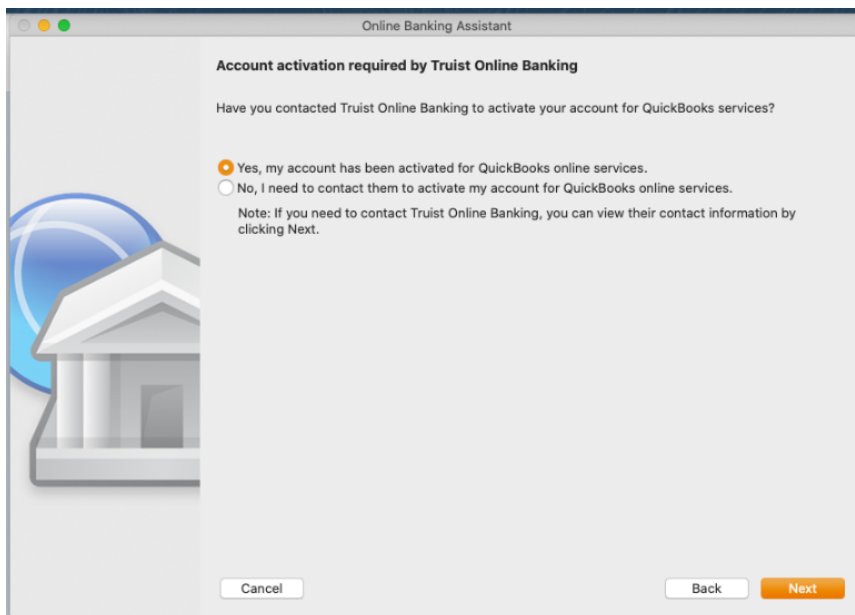
[Tell me more about online banking.](#)

**Cancel** **Back** **Next**

6. You are asked how you want to connect to your financial institution. Select **Direct Connect**, then click **Next**.



7. 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.)



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

8. 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**.

Online Banking Assistant

**Log in to Truist Online Banking**

Customer ID:   
Use your Truist User ID

Password:   
Use your Truist Password

Confirm Password:

☐ Add Password to Keychain  
To sign in to Truist Online Banking with a secure Internet connection, click Sign In.

**Need a customer ID and password?**  
Your QuickBooks login is the same as the login to your Truist Online Banking website.  
URL: <https://www.truist.com/>  
Phone: 888-228-6654  
No fees for statement download

Cancel Back Sign In

9. 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**.

Online Banking Assistant

**Select the BB&T - Online Banking accounts you want to connect to QuickBooks**

Now you need to link each of your bank accounts to a QuickBooks account. When you import transactions from your bank account, the transactions are stored in the QuickBooks account you've linked to the bank account.

Account Name	Account Number	Account Type	Store in the QuickBooks Account
	8424	Checking	Select an Account
	8416	Checking	Select an Account

Cancel Back Next

10. A conformation 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 registrationRegister 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

[Back to top of the document](#)

Paying bills from Direct Connect

If you pay bills from Direct Connect and did not have a SunTrust Online Banking profile

Your pay bills connection with Truist is active and you can repoint to pay your bills in Direct Connect to Truist from SunTrust.

**Note:** Below is a table summarizing differences between the Truist and SunTrust’s versions of Direct Connect’s Bill Pay.

Paying bills via SunTrust Direct Connect	Paying bills via Truist Direct Connect
Electronic payments could be scheduled one business day in advance.	Electronic payments must be scheduled two business days prior to the Deliver By date.
Payment amount is deducted from the account on the Due Date or later.	Pending payment amount deducted from the Available Balance 2 business days prior to payment delivery for electronic payments.
Cutoff time: 10:00pm ET  Payments submitted after 10:00pm ET are automatically adjusted to the next available Deliver by Date.	Cutoff time: 7:00pm ET  Payments submitted after 7:00pm ET are automatically adjusted to the next available Deliver by Date.

[Back to top of the document](#)

If you pay bills from Direct Connect and have a SunTrust Online Banking profile

Your pay bills connection with Truist is active and you can repoint to pay your bills in Direct Connect to Truist from SunTrust.

**Note:** Below is a table summarizing differences between Truist and SunTrust’s versions of Direct Connect’s Bill Pay.

Paying bills via SunTrust Direct Connect	Paying bills via Truist Direct Connect
Electronic payments could be scheduled one business day in advance.	Electronic payments must be scheduled two business days prior to the Deliver By date.
Payment amount is deducted from the account on the Due Date or later.	Pending payment amount deducted from the Available Balance 2 business days prior to payment delivery for electronic payments.
Cutoff time: 10:00pm ET  Payments submitted after 10:00pm ET are automatically adjusted to the next available Deliver by Date.	Cutoff time: 7:00pm ET  Payments submitted after 7:00pm ET are automatically adjusted to the next available Deliver by Date.

[Back to top of the document](#)



## 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 884-4TRUIST (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.

Account Security and Claims, and Credit Card support teams are available 7 days a week, 24 hours a day.