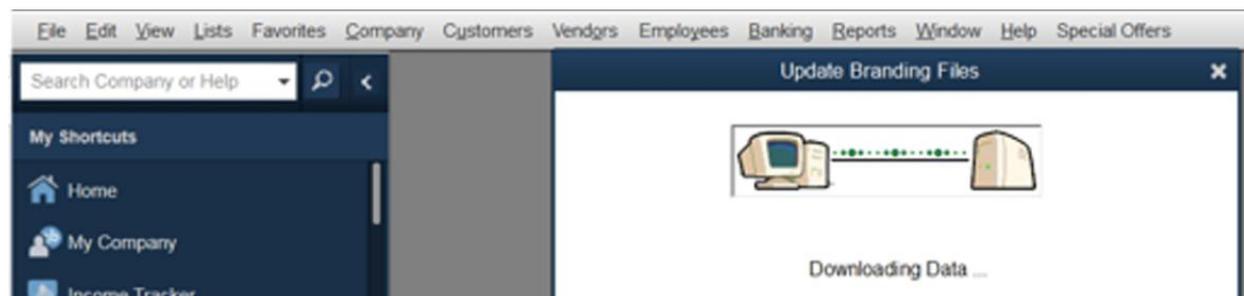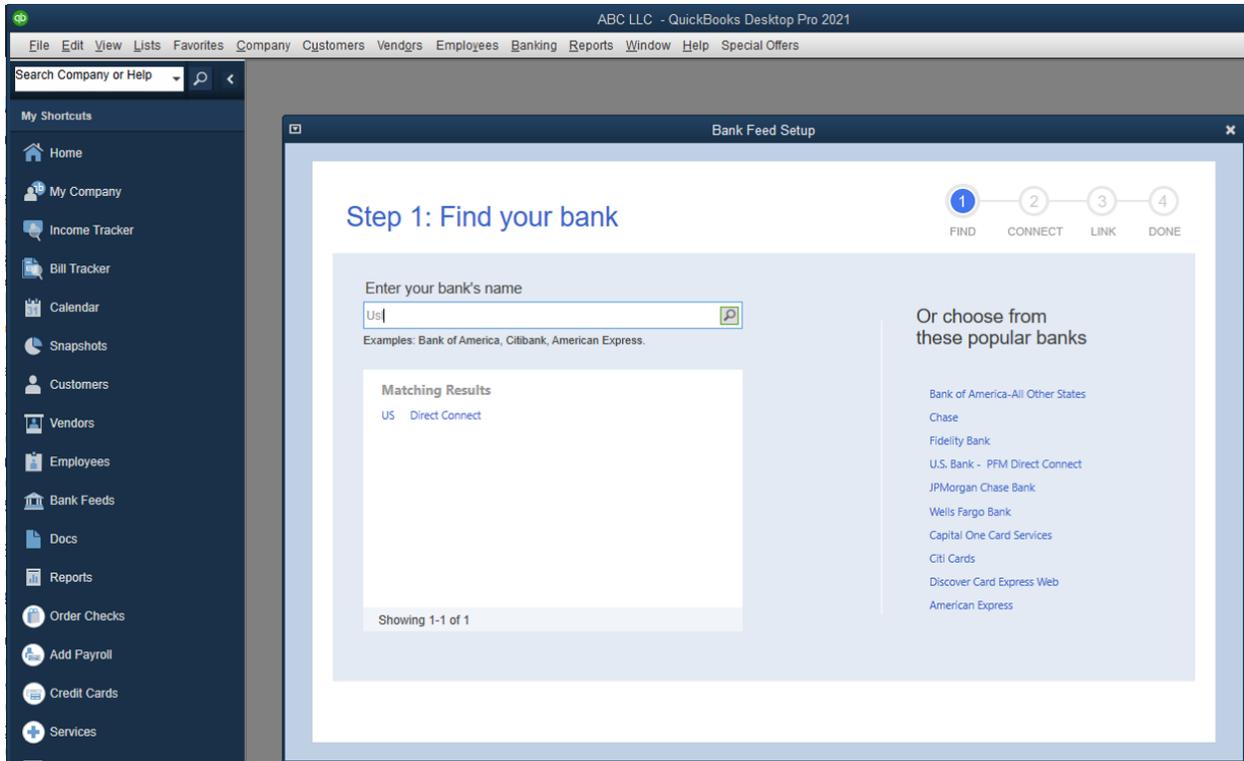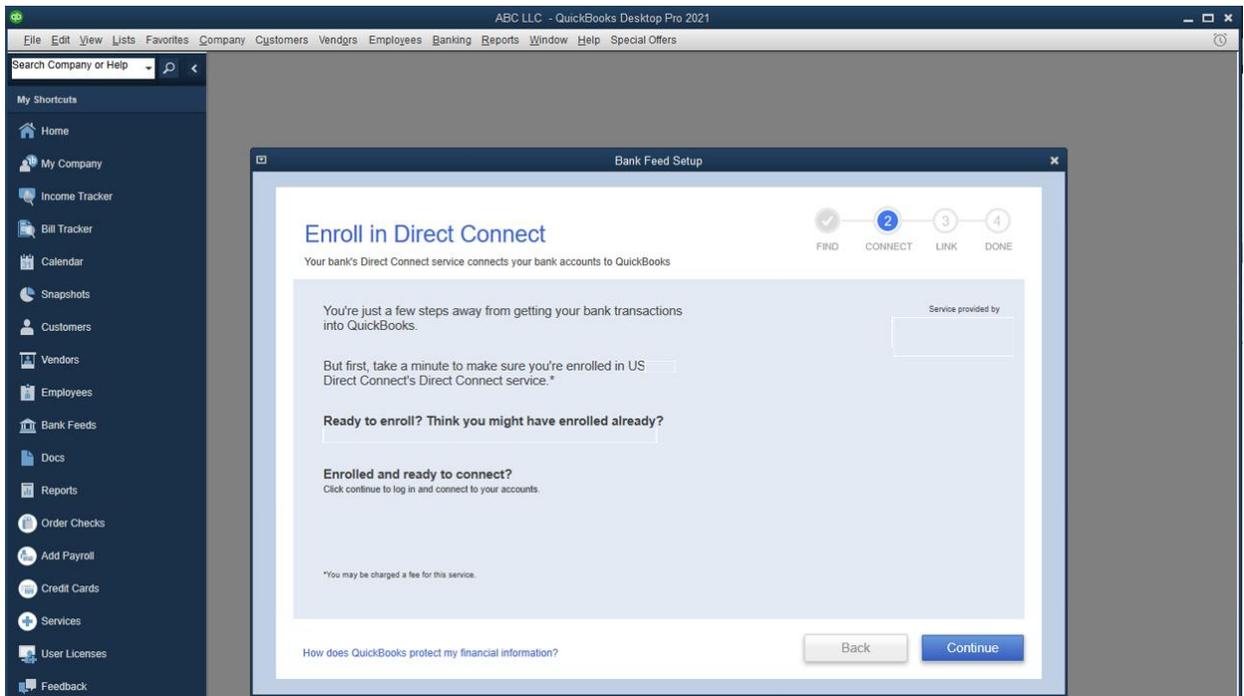To enable QuickBooks Direct Connect your customer would need to open QuickBooks on their desktop and then go to Banking → Bank Feeds → Set up Bank Feed for an Account
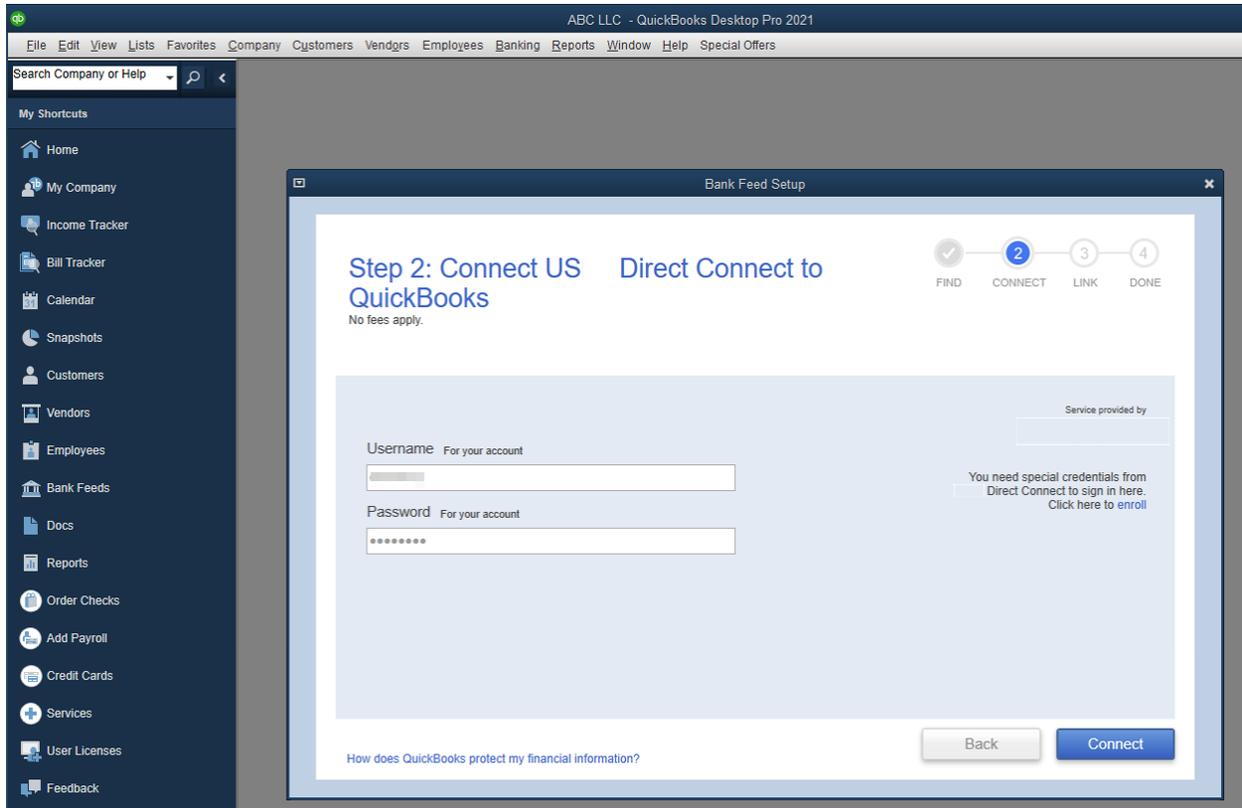
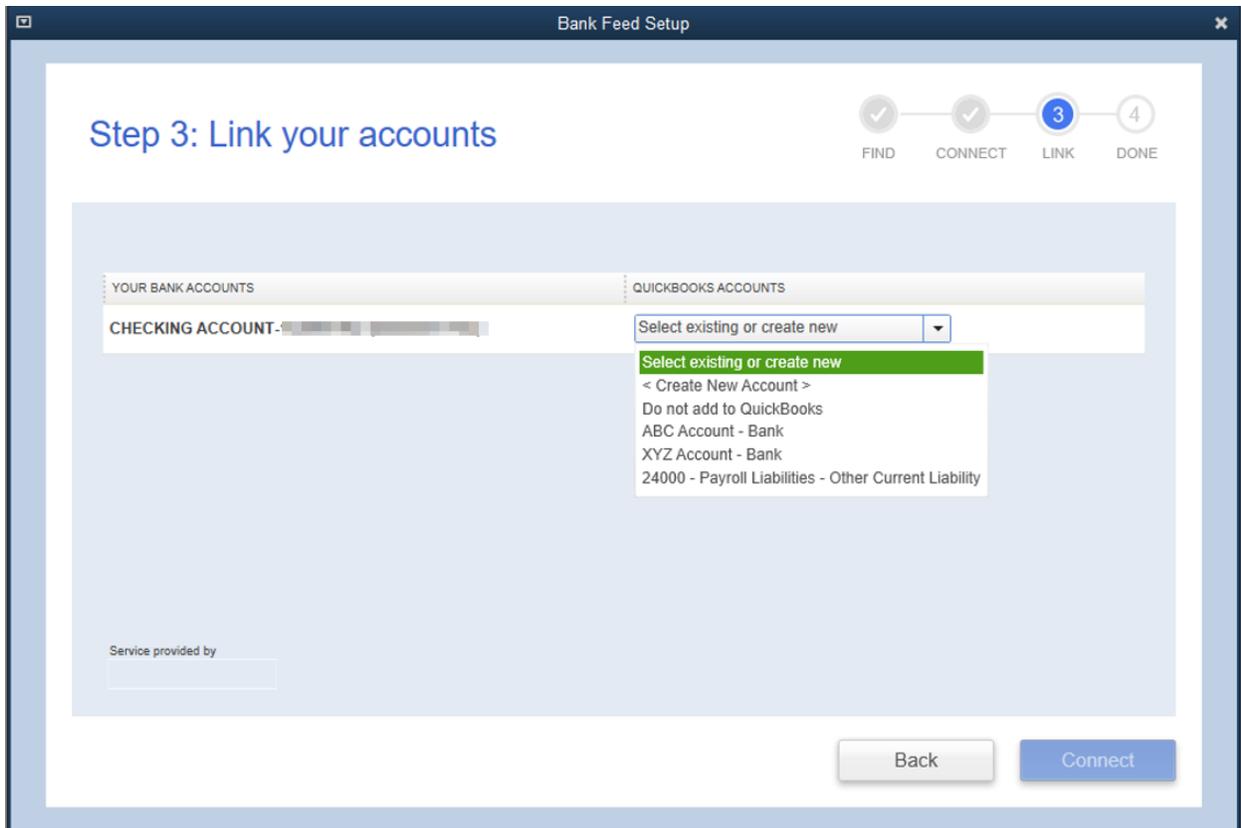As you start typing your bank name you will see match results populate.

For QuickBooks Direct Connect with Business Online please select Royal Business Bank BO QBDC
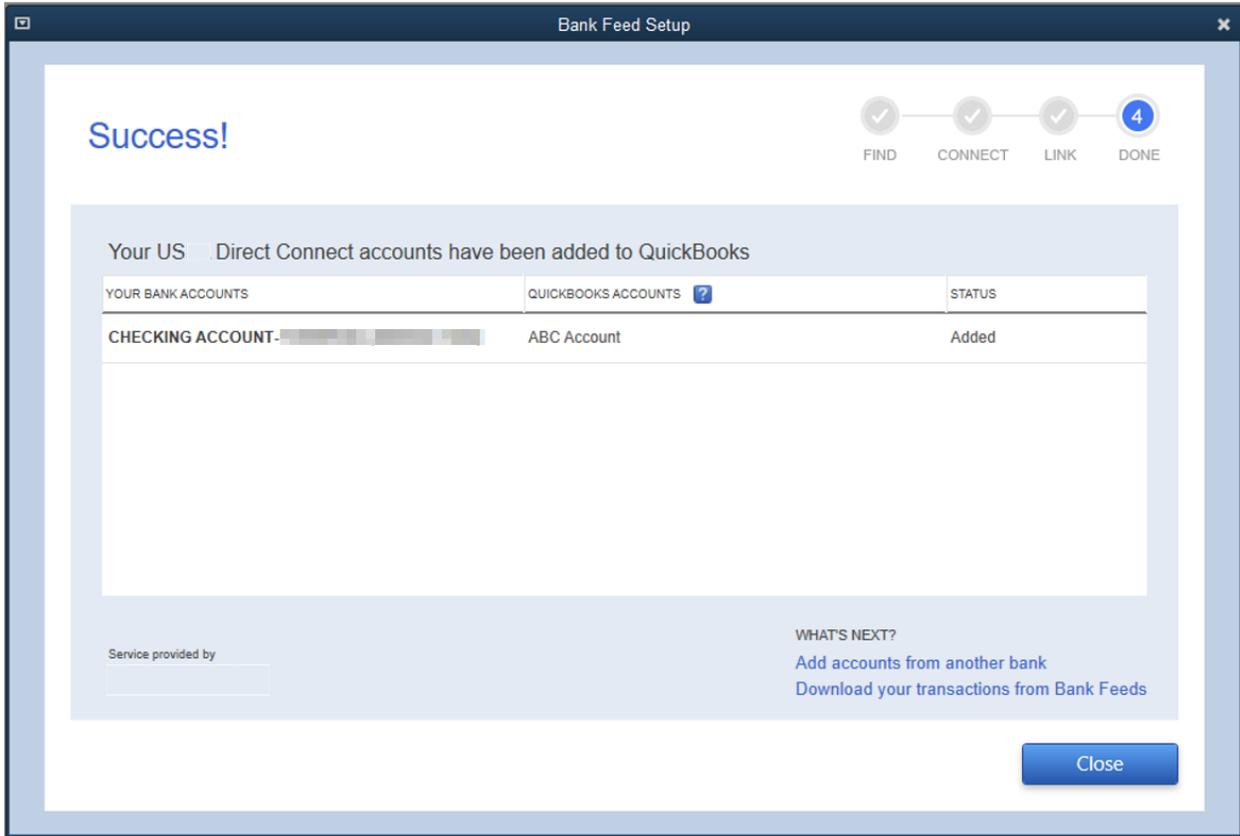

Next, select Continue

Next, enter your Business Online credentials (Username & Password) and select Connect.
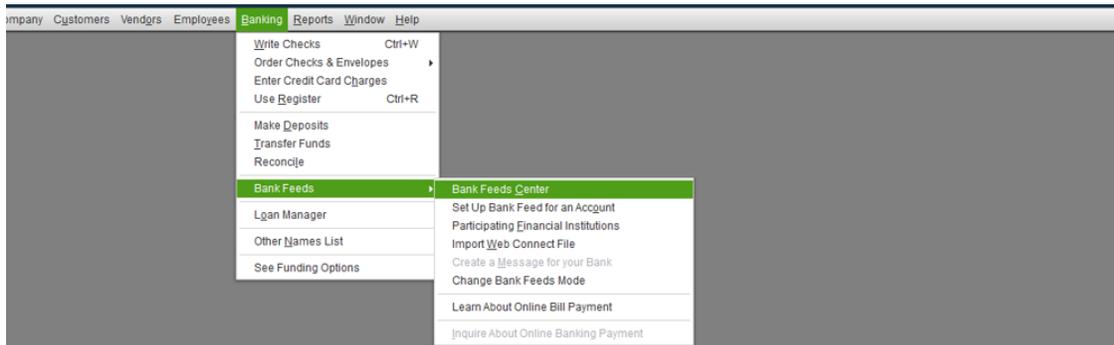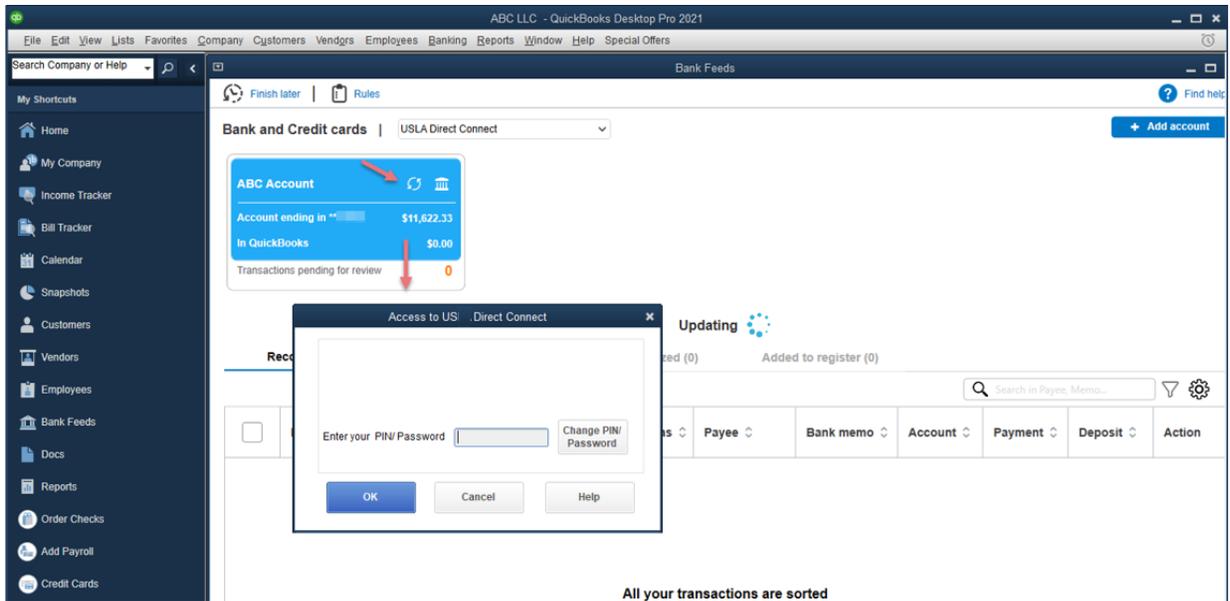
Next, select or create a QuickBooks category for the referenced account and select Connect. For test purposes I created ABC Account – Bank and XYZ Account – Bank.

At this point you have successfully enrolled. 😊

Download Transactions Attempt below…

Select the Update Account option (chasing arrow icon) and enter your Retail or Business Online password.