QuickBooks Functionality

Supported connectivity and available timeframes

Needham Bank supports the following QuickBooks functionality for the following timeframes:

- **DirectConnect:** A two-way connectivity between Business Online and QuickBooks.
  - Data is available for 90 days.

    NOTE: Transactions that post today will not be available for QuickBooks until the next business day.
- **Web Connect:** Download account history data in a QuickBooks compatible format.
  - Data is available for 360 days.

    NOTE: Transactions that post today will not be available for QuickBooks/Quicken until the next business day.

    NOTE: QuickBooks Bill Pay connectivity is not available via Web Connect.

DirectConnect Self-Enrollment

- Within your Business Online, go to the **Service Center** module and navigate to the sub-tab, **Service Center**.
- Under Card and Online Services, select **QuickBooks/Quicken**.
- In the **Direct Connect Self-Enrollment** section, check off which product(s) you would like to use for Direct Connect. Then click **Enroll** to save.

Once completed, log into your QuickBooks to complete your bank feed account set up. When prompted for the Financial Institution, select Needham Bank-Business DC then enter your Needham Bank Business Online username and password.

Common Troubleshooting for DirectConnect

1. Ensure your Business Online username and password are active and up-to-date and currently do not require to be changed or unlocked.

2. Ensure you have enrolled your NB Business Online username for QuickBooks / Quicken functionality located within your Business Online profile under Service Center.
3. Ensure you have updated your QuickBooks/Quicken bank feed with your current Needham Bank username and password.

Bill Pay Connectivity with QuickBooks DirectConnect

Needham Bank's Bill Pay currently supports Quickbooks DirectConnect connectivity:

1. Ensure you have completed your Direct Connect enrollment in Business Online.
2. Ensure you set up your QuickBooks bank feed for the desired account.

Within QuickBooks, locate the account in your bank feeds then enable the account for Online Bill Pay.

Web Connect Download for QuickBooks

1. From your business online profile, navigate to the **Service Center** and select **QuickBooks/Quicken.**
2. In the section called **Web Connect Download**, select the desired account number, the desired length of time and the desired software type.
3. Then click **Download.**

The file will then download locally to your computer.