Introduction

Independent Bank is excited to offer Direct Connect*.* If you would like to enhance your Intuit connection, you will need to modify your QuickBooks settings to ensure the smooth transition of your data. It is important that you perform the following instructions exactly as described and in the order presented.

Documentation and Procedures

Task 1: Pre-set up

After you sign into your QuickBooks account you must disable your account(s) from any online connection prior to using direct connect for the first time to pull transaction information.

- Choose the **Lists menu** > **Chart of Accounts**.
- Select the account you want to deactivate.
- Click **Edit menu** > **Edit Account**.
- Click on the **Online Services** tab in the Edit Account window. The tab is named **Bank Feed Settings** in QuickBooks 2014 and newer.
- Select **Deactivate All Online Services** and click **Save & Close**.
- Click **OK** for any dialog boxes that may appear with the deactivation.
- Repeat steps 2 – 6 for each account at **Independent Bank***.*

Task 2: Set up Direct Connect

Once the pre-set up steps above are done you can download transaction information to QuickBooks using your Independent Bank's Online Banking credentials.

- Choose **Banking** menu > **Bank Feeds** > **Set Up Bank Feeds for an Account**
- On the **Step 1: Find your bank** screen, type **Independent Bank Group DC** in the entry field. When that appears in the filter results, click it.
- Enter your credentials and click **Connect** to connect to your bank.
- After you connect, you will see all accounts at that you can add to QuickBooks. Make a selection for each account to add to use an existing, create a new account, or select not to add the account to QuickBooks.
- After you add your accounts, click **Close.**