Business Banking Financial Management Connectivity Guide

QuickBooks- *Software installed on PC. Navigant CU supports the current year's version and two (2) previous year's versions.*

- **Direct Connect:** Upon access to Business Banking under "Additional Services" tab, the user can self-enroll and create a Direct Connect Password/PIN. Once enrolled, QuickBooks users can import cleared account transactions from Business Banking.

  When searching for Navigant CU choose: Navigant Credit Union- DC QB Bus

  ***NOTE** At this time, Direct Connect to QuickBooks does not include integration with NCU's Bill Payment service.*

- **Web Connect**: Business Online Banking users can export cleared transactions into QuickBooks. Connection pushes transactions to the PFM (personal finance manager) while user is logged into Business Online Banking.

  When searching for Navigant CU choose: Navigant Credit Union - WC QB Bus

QuickBooks Online Users:

- Members should be able to access their account information using this web-based product. When searching for Navigant CU choose: Navigant Credit Union

- **Support:** If they require assistance, they can contact **QuickBooks Online Edition (QBOE) technical support** at **1-800-926-3667**.

Intuit Support

- Member should contact the Intuit support site at www.intuit.com/support if they are having technical issues with their software.