Quickbooks® Direct Connect Set Up Guide

F&M BANK
A Tradition for Life

Please Note: *First complete the Direct Connect enrollment form on the F&M Bank website to enable you to sync your F&M Bank account to QuickBooks prior to following the steps below.*

Once you are logged into QuickBooks:

1. Go to **Banking**, then select **Online Banking Setup**.
2. Enter **F&M Bank - NC**, then select **Next**.
3. Select **Direct Connect**, then **Next**.
4. Once your F&M Bank account is activated for QuickBooks online services (with acknowledgment from F&M Bank of your completed enrollment form), select **Yes**, then **Next**.

If you selected **Yes** and you're asked to sign in, here's how to continue the set up:

1. Sign in with your F&M Online Banking credentials.
2. Choose **Select an Account** to display the list of available QuickBooks accounts.
3. Select which QuickBooks account you wish to link with your F&M Bank account. ***Please Note:*** *You can only link one QuickBooks account per F&M Online Banking account.*
4. Select **Next** to download your transactions.
5. Once QuickBooks is done with the download, select **Finish**. This displays your downloaded transactions.

If you selected **Yes** and you're asked to select an account type, here's what to do:

1. Select the account type for the account you wish to download.
2. Enter your account number. If this is a banking account, enter the routing number.
3. Choose **Select an Account** to display the list of available QuickBooks accounts.
4. Select which QuickBooks account you wish to link with your bank account. ***Please Note:*** *You can only link one QuickBooks account per F&M Online Banking account.*
5. Sign in with your F&M Online Banking credentials.
6. Once QuickBooks is done with the download, select **Finish**. This displays your downloaded transactions.

Please contact Rhonda Martin at rmartin@fmbnc.com or 704.762.2258 if you have any questions or experience any issues with this set up process.