

There are two ways to connect to Pima Federal Credit Union using QuickBooks Online.

1. **Web Connect** is where you log in to **Business Online Banking**.

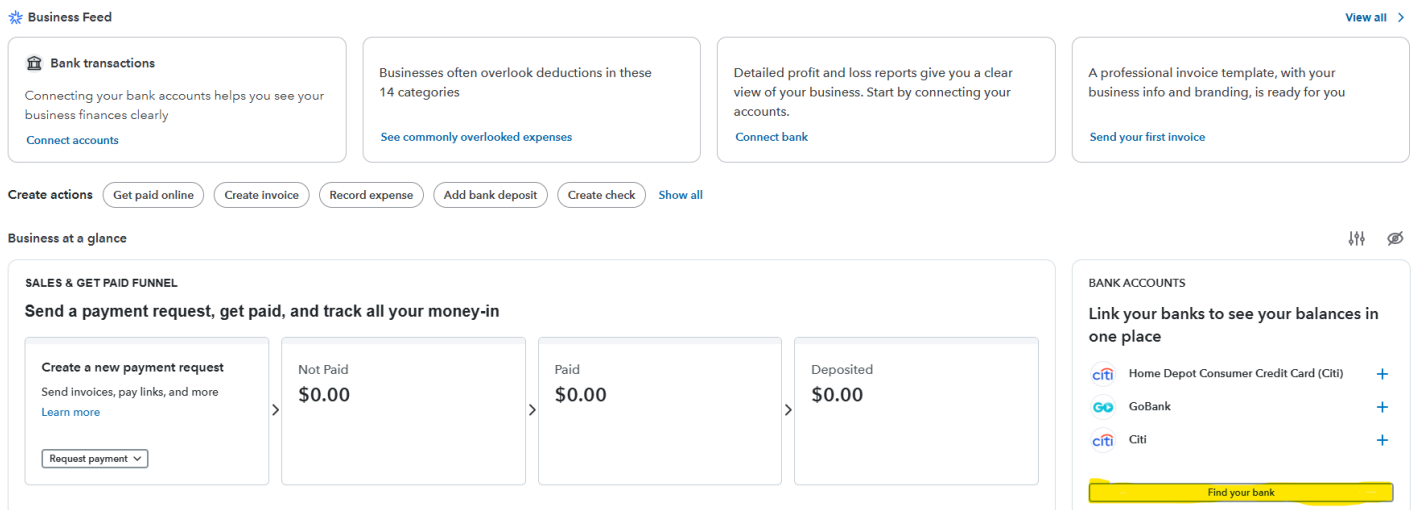
- Select the data range and account you want to export and then pull the data into QuickBooks for reconciliation of transactions. For more information on this method see the **Web Connect for QuickBooks Online Quick Reference Guide**.

2. **Direct Connect/Express Web Connect** is where you log in directly from **QuickBooks into Pima Federal**. With **Direct Connect/Express Web Connect**, there are a couple things you need to know:

- **Direct Connect/Express Web Connect** will automatically pull ALL available account activity into QuickBooks unless you select otherwise in the Which Accounts do you want to Connect screen.
- Pima Federal does NOT support the bill pay function within Direct Connect, only the data transmission.

Before you begin using Direct Connect, we **STRONGLY** encourage you to run a full backup of your QuickBooks data in the event you need to restore everything back to where it started.

- To begin, login to QuickBooks online and go to **Connect Accounts** in the bank accounts section.



The screenshot shows the QuickBooks Online dashboard. At the top is the 'Business Feed' section with four cards: 'Bank transactions' (with a 'Connect accounts' link), 'Overlooked deductions' (with a 'See commonly overlooked expenses' link), 'Profit and loss reports' (with a 'Connect bank' link), and 'Professional invoice template' (with a 'Send your first invoice' link). Below this is a 'Create actions' bar with buttons for 'Get paid online', 'Create invoice', 'Record expense', 'Add bank deposit', 'Create check', and a 'Show all' link. The 'Business at a glance' section features a 'SALES & GET PAID FUNNEL' with a flow: 'Create a new payment request' (with a 'Request payment' dropdown) → 'Not Paid \$0.00' → 'Paid \$0.00' → 'Deposited \$0.00'. To the right is the 'BANK ACCOUNTS' section titled 'Link your banks to see your balances in one place', listing 'Home Depot Consumer Credit Card (Citi)', 'GoBank', and 'Citi', each with a '+' icon to add it. A yellow 'Find your bank' button is at the bottom.

- Enter “**Pima Federal**” in the “**Enter your bank name or URL**” box.
- Select the **Pima Federal Credit Union Connect Now** option.

Let's get a picture of your profits

Connect your bank or credit card to bring in your transactions.

Pima Federal 

Credit Card **Checking** **Savings** **Taxable Brokerage** **401(k)**

1 out of 1 results for **Pima Federal**



Pima Federal Credit Union
<https://www.pimafederal.org/>

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[Privacy](#)



- Enter your Business Online Banking login credentials.



Sign in to account

Intuit securely stores this info. We'll use it to access your account data as needed and share it with QuickBooks Online Edition.

Username

PimaFederal 

Password

 Show

..... 

[Forgot your sign-in? Let's go find it](#)

Back

Continue

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- Next, “Link your accounts” will appear. This is where you will map your accounts in Business Online Banking to your accounts in QuickBooks. *It is very important you map the accounts correctly to avoid downloading data into the wrong account.*

Which accounts do you want to connect?

Savings Account *ount
Balance: \$60.96

Small Business Checking *king
Balance: \$247.57

Money Market Account *ount
Balance: \$0.50

Connect

Which accounts do you want to connect?

Savings Account *ount
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Money Market Account *ount
Balance: \$0.50

We will pull transactions from the selected accounts from 01/01/2020. Or you can select a different date to pull transactions from. Some bank limitations may apply.

This year (01/01/2020)

Connect

You are now ready to pull transactions into QuickBooks. For next steps within QuickBooks and frequently asked questions visit the link below.

[QuickBooks: Next Steps and FAQ](#)