

Quickbooks for Windows Instructions for Direct Connect

1. Deactivate your previous PVFCU Quickbooks Link for each account at PVFCU.
 - a. Open your Chart of Accounts (Lists > Chart of Accounts)
 - b. Right click on the account you want to disconnect from online banking and click **Edit Account**
 - c. Click the tab toward the top of the window that says **Online Services**
 - d. Click the button that says "**Deactivate All Online Services**"
2. Open the **Banking** menu up top, select **Online Banking**, then **Setup Account for Online Services**.
3. Select the Quickbooks account you want to link (ex. Checking)
4. Click the **Financial Institution** drop-down arrow and then type or select "**Park View FCU – DC – NEW**" and click Next. You may need to refresh to "import new financial institutions."
5. In the "Special Quickbooks Pin" dialog box, choose "I have my Special Quickbooks Online Services Park View FCU – DC – NEW" PIN. Click Next. (Note: although the software says that your online banking password will not work, your MoneyView Member ID and Password do work.)
6. Use your MoneyView Member ID (or Account Number) and Password when requested and sign in. (Note: anytime you are asked for your "PIN" you can use your MoneyView Password).
7. Choose an account number, retrieve transactions, and add/match transactions to Quickbooks.