



OFX – Direct Connect

Connection Types for Intuit® Products:

- **Direct Connect** – is a two-way communication, users synchronize account information and also allows internal transfer and bill pay capabilities
- **Web Connect** – opens a one-way communication, login from Online Banking with content download
- **Express Web Connect (Online)** – similar to web connect; however, this connection type is not supported by online banking

Direct Connect Considerations:

- ✓ Used for Quicken® (find Third Coast Bank ssb) and QuickBooks® (find Third Coast Bank ssb DC)
- ✓ Customers may need to run an update on their software to view this product update
- ✓ Password changes are made in Online Banking and then must be updated by the Intuit® product
- ✓ This connection type bypasses the secure token functionality

FAQs:

- **How can I turn this on for my online banking?**
 - OFX – Direct Connect is automatically available within Third Coast Bank’s online banking system.
 - You should begin the setup for an account within your Intuit® product. Supported for Windows® and Mac® operating systems.
- **Who do I contact for support?**
 - Online Banking Password – contact Third Coast Bank
 - Quicken® or QuickBooks® – contact Intuit® Support
- **What type of Transfers can I process with Direct Connect?**
 - Internal transfers may be made within Direct Connect.
 - Only immediate or scheduled transfers are supported. (Recurring transfers and transfers processed on Saturday or Sunday are not supported.)
 - The daily transfer cutoff time is 2:00 pm.
- **How can I process Bill Payments with Direct Connect?**
 - Your online banking profile must already be enrolled in Bill Payment capabilities before utilizing any Direct Connect Bill Pay features.
 - Payees may be established in online banking or Direct Connect.
 - Recurring payments are not supported.
 - The processing date is the date the payment is sent (mailed), and the due date is the delivery date for the payment.

Review the OFX – Direct Connect User Guide for more details.