

QuickBooks Windows Direct/Web Connect

Before the 1st Action Date: May 8th 2025

1. Backup QuickBooks Windows Data File & Update.
 - a. Choose File > Back Up Company > Create Local Backup.
 - b. Download the latest QuickBooks Update. Go to Help > Update QuickBooks Desktop.
2. Complete a final transaction download and match downloaded transactions.
 - a. Complete one last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers. (required)

On or After the 2nd Action Date: May 13th 2025

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.
 - a) Choose Lists menu > Chart of Accounts.
 - b) Right-click on the first account you would like to deactivate and choose Edit Account.
 - c) Click the Bank Feeds Settings tab in the Edit Account window.
 - d) Select Deactivate All Online Services and click Save & Close.
 - e) Click OK for any alerts or messages that may appear with the deactivation.
 - f) Repeat steps for any additional accounts that apply
2. Reconnect online banking connection for accounts that apply.
 - a) Download a Web Connect file (.qbo or .qfx) from your financial institution's online banking site.
 - b) In QuickBooks Online, choose Banking from the left column.
 - c) Click File Upload in the upper-right side of the screen and use the upload dialog to locate the Web Connect file you downloaded in step a.
 - d) Choose the appropriate account from the drop-down menu under QuickBooks Account and then click Next. Important: Do NOT choose "+Add New" in the drop-down menu unless you intend to add a new account to QuickBooks Online.
 - e) When the import is finished, click Let's go!
 - f) Review the For Review tab on the Banking page to view what was downloaded.
 - g) Click Next, and then click Done.
 - h) Repeat this step for each account that you have connected to this institution.