

QuickBooks Mac Direct Connect to Web Connect

Before the 1st Action Date: **May 8th 2025**

1. Backup QuickBooks Mac Data File & Update the Application.

- a. Choose File > Backup.
- b. Download the latest QuickBooks Update. Choose QuickBooks > Check for QuickBooks Updates.

2. Complete a final transaction download.

- a. Complete 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 > Chart of Accounts.
- b) Click the first account you would like to deactivate and choose Edit > Edit Account.
- c) Choose Online Settings in the Edit Account window.
- d) In the Online Account Information window, choose Not Enabled from the Download
- e) Transactions list and click Save.
- f) Click OK for any alerts or messages that may appear with the deactivation.
- g) Repeat steps for any additional accounts that apply.

2. Reconnect online banking connection for accounts that apply.

- a) Log in to your financial institution's online banking site and download your transactions into to a QuickBooks (.qbo) file.

Important: Take note of your last successful upload. Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.

- b) b. In QuickBooks, choose File > Import > From Web Connect. Use the import dialog to import your saved Web Connect file.
- c) c. In the Account Association window, click Select an Account to choose the appropriate existing account register.

Important: Do NOT select “NEW” under the action column unless you intend to add a new account to QuickBooks.

d. Click Continue and OK for any dialog boxes that require action.