

# QuickBooks Desktop Conversion Instructions

## QuickBooks Mac Direct Connect

Instructions for One-Step Update initiated within QuickBooks

**On or After Tuesday, December 8:** Disconnect & Reconnect Your Accounts

### Step 1: Disconnect Your Accounts

1. Choose **Lists > Chart of Accounts**.
2. Click the first account you would like to deactivate and choose **Edit > Edit Account**.
3. Choose **Online Settings** in the **Edit Account** window.
4. Choose **Not Enabled** from the **Download Transactions** list and click **Save**.
5. Click **OK** for any alerts or messages that may appear with the deactivation.
6. Repeat steps for any additional accounts that apply.

### Step 2: Reconnect Your Accounts

1. Choose **Banking > Online Banking Setup**.
2. Type the Bank's name in the search field, then click **Next** and follow the instructions.
3. Select **Yes, my account has been activated for QuickBooks Online Services** in the Online Banking Assistant window. Click **Next**.
4. Enter your Direct Connect credentials. These may not match your Online Banking credentials.
5. For each account you wish to download into QuickBooks, click **Select** and **Account** to connect to your existing account's registers.
6. Click **Next** and then click **Done**.
7. Repeat this step for each connected account.