

# QuickBooks Online Conversion Instructions

## QuickBooks Online Express Web Connect

Instructions for One-Step Update initiated within QuickBooks Online

**IMPORTANT: Express Web Connect will not be available until Tuesday, December 15 so please utilize another connectivity type if you need transaction updates during this downtime.**

### On or After Tuesday, December 8: Disconnect Your Accounts

1. Select Banking from the left column.
2. Click the account to disconnect and click the Pencil Icon on the corner of that account box.
3. Click Edit Account Info.
4. Check the box next to **Disconnect this Account on Save**.
5. Select Save and Close.
6. Repeat steps for any additional accounts that apply.

### On or After Tuesday, December 15: Reconnect Your Accounts & Exclude Dupe Transactions

#### Step 1: Reconnect Your Accounts

1. On the Banking page, click **Add Account** in the upper-right side of the screen.
2. Type your financial institution's name and choose the correct option from the results.
3. Enter your Online Banking credentials and click **Continue**.
4. Provide additional information, if requested.
5. Choose the matching accounts in the drop-down menu.
6. After all accounts have been matched, click **Connect** and then click **Finish**.

**IMPORTANT: Do NOT select +Add New unless you intend to add a new account to QuickBooks Online.** If there are accounts you don't want to track, uncheck the box next to it.

#### Step 2: Exclude Duplicate Transactions

1. On the Banking page, click **For Review**.
2. Click the checkboxes for the transactions you want to exclude.
3. Choose **Batch Actions > Exclude Selected**.