QuickBooks Online Conversion Instructions

QuickBooks Online Web Connect
Instructions for Downloading a Web Connect file from Online Banking

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

Step 1: 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.

Step 2: Reconnect Your Accounts

1. Download a Web Connect file (.qbo or .qfx) from Online Banking.
2. In QuickBooks Online, choose **Banking** from the left column.
3. Click **File Upload** in the upper-right side of the screen and upload the Web Connect file.
4. Choose the appropriate account from the menu under **QuickBooks Account** and click **Next**.
5. When the import is finished, click **Let's go!**
6. Review the **For Review** tab on the **Banking** page to view what was downloaded.
7. Click **Next**, and then click **Done**.
8. Repeat this step for each account that you have connected to this institution.

IMPORTANT: Do NOT choose +Add New in the drop-down menu unless you intend to add a new account to QuickBooks Online.