

QuickBooks Desktop Conversion Instructions

QuickBooks Windows 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. Right-click on the first account you would like to deactivate and choose **Edit Account**.
3. Click the **Bank Feeds Settings** tab in the **Edit Account** window.
4. Check the box next to **Disconnect this Account on Save**.
5. Select **Deactivate All Online Services** and click **Save & Close**.
6. Click **OK** for any alerts or messages that may appear with the deactivation.
7. Repeat steps for any additional accounts that apply.

Step 2: Reconnect Your Accounts

1. Choose **Lists > Chart of Accounts**.
2. Right-click on an account you would like to activate and choose **Edit Account**.
3. Select **Set Up Bank Feeds** on the bottom of the popup screen and select **Yes**.
4. Enter your institution's name in the search field and select Continue.
5. Enter your Direct Connect credentials. These may not match your Online Banking credentials.
6. Link to your existing accounts in the drop-down options labeled **Select Existing** or **Create New**.
7. After all accounts have been matched, click **Next** and then click **Done**.

IMPORTANT: Do NOT select "Create New Account" unless you intend to add a new account to QuickBooks. If you are presented with accounts you do not want to track in this data file, choose **Do Not Add to QuickBooks**.