

QuickBooks

Mac Direct Connect

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 **Transactions** list and click **Save**.
 - e. Click **OK** for any alerts or messages that may appear with the deactivation.
 - f. Repeat steps for any additional accounts that apply.

2. Reconnect online banking connection for accounts that apply.
 - a. Choose **Banking > Online Banking Setup**.
 - b. Type your institution's name in the search field, then click **Next** and follow the instructions in the setup screen.
 - c. Select **Yes, my account has been activated for QuickBooks Online Services** in the Online Banking Assistant window. Click **Next**.
 - d. Enter your Direct Connect credentials. Direct Connect might require credentials that do not match your online banking credentials. Contact your financial institution if your login information does not work.
 - e. For each account you wish to download into QuickBooks, click **Select** and **Account** to connect to your existing account's registers.
 - f. Click **Next**, and then click **Done**.
 - g. Repeat this step for each account that you have connected to this institution.