

QuickBooks

Mac Web Connect

1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.
 - a. Choose Lists > Chart of Accounts.
 - b. Select the first account you would like to deactivate and choose **Edit > Edit Account**.
 - c. Select **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 dialog boxes 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. Log in to your financial institution's online banking site and download your transactions into to a QuickBooks (.qbo) file.
 - **Important: Take note of your last successful upload.** Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.
 - b. In QuickBooks, **choose File > Import > From Web Connect**. Use the import dialog to import your saved Web Connect file.
 - c. In the Account Association window, click **Select an Account** to choose the appropriate existing account register.
 - **Important: Do NOT select "NEW" under the action column unless you intend to add a new account to QuickBooks.**
 - d. Click **Continue** and **OK** for any dialog boxes that require action.