

QuickBooks

Windows Direct Connect

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.
 - a. Choose **Lists** menu > **Chart of Accounts**.
 - b. Right-click on the first account you would like to deactivate and choose Edit Account.
 - c. Click the Bank Feeds Settings tab in the Edit Account window.
 - d. Select Deactivate All Online Services and click Save & Close.
 - 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 **Lists** menu > **Chart of Accounts**.
 - b. Right-click on an account you would like to activate and choose Edit Account.
 - c. Select Set Up Bank Feeds on the bottom of the popup screen and select Yes in the dialog box that will appear.
 - d. Enter your institution's name in the search field and select Continue.
 - e. 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.
 - f. Ensure you associate the accounts to the appropriate accounts already listed in QuickBooks. Link to your existing accounts in the drop-down options labeled Select Existing or Create New.
 - g. **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**.
 - h. After all accounts have been matched, click Next and then click Done.