

# QuickBooks Windows Web Connect

## Step 1: Back up QuickBooks file

1. Back up your QuickBooks Windows Data File. Go to **File > Back Up Company > Create Local Backup**.
2. Download the latest QuickBooks Update. Go to **Help > Update QuickBooks Desktop**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers. (required)

## Step 2: Deactivate Direct Connect

1. Deactivate your online banking connection for accounts connected to Institution for Savings.
  - a. Choose **Lists > 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.

## Step 3: Activate a Web Connect account:

1. Log into Institution for Savings Online Banking, click the option to download your account information as a Web Connect (QFX) file.

**IMPORTANT: Take note of your last successful download from Step 1.** Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.

2. In QuickBooks, choose **File > Utilities > Import > Web Connect Files**. Locate your saved Web Connect file and select to import.
3. In the Select Bank Account dialog select **Use an existing QuickBooks account**.

**IMPORTANT: Do NOT select "Create a new QuickBooks account" unless you intend to add a new account to QuickBooks.**

4. In the drop-down list, choose your QuickBooks account(s) and click **Continue**. Confirm by selecting **OK**.
5. Repeat this step for each account you have connected to this institution.

## QuickBooks Mac Web Connect

### Step 1: Back up QuickBooks file

4. Back up your QuickBooks Windows Data File. Go to **File > Back Up**.
5. Download the latest QuickBooks Update. Go to **QuickBooks > Check for QuickBook Updates**.
6. Complete a final transaction download. Accept all new transactions into the appropriate registers. (required)

### Step 2: Deactivate Direct Connect

2. Deactivate your online banking connection for accounts connected to Institution for Savings.
  - 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.

### Step 3: Activate a Web Connect account:

1. Log into Institution for Savings Online Banking, click the option to download your account information as a Web Connect (QFX) file.

**IMPORTANT: Take note of your last successful download from Step 1.** Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.
2. In QuickBooks, choose **File > Import > From Web Connect**. Use the import dialog to import your saved Web Connect file.
3. 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.

4. Click **Continue** and **OK** for any dialog boxes that require action.
5. Repeat this step for each account you have connected to this institution.