

# QuickBooks for Mac Conversion Instructions

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## *Web Connect to Direct Connect*

### Introduction

QuickBooks Direct Connect is now available for First Federal Lakewood Business Online Banking. If you are interested in switching from Web Connect to Direct Connect follow the instructions below to ensure a smooth transition of your data. To complete these instructions, you will need your User ID and Password for First Federal Lakewood Business Online Banking.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

### Documentation and Procedures

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#### **Task 1:** Conversion Preparation

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1. Back up your data file. For instructions to back up your data file, choose **Help** menu and use the Search bar available at the top. Search for **Back Up** and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu and use the Search bar available at the top. Search for **Update QuickBooks**, select **Check for QuickBooks Updates** and follow the instructions.

#### **Task 2:** Connect to *First Federal Lakewood Business Online Banking* for a final download of your data before you switch to Direct Connect

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1. Log in to Business Online Banking and download your QuickBooks Web Connect File.
2. Log into QuickBooks, click **File > Import > From Web Connect**.
3. Link your bank account with the existing QuickBooks account and click **Continue**.
4. Repeat steps for each account.

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**Task 3: Match Downloaded Transactions**

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If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose the **Help** menu and use the Search bar available at the top. Search for **Updating Your Register**, select the article with that name and follow the instructions.

**NOTE:** All transactions must be matched or added to the register prior to disconnecting your accounts.

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**Task 4: Disconnect *First Federal Lakewood Business Online Banking Accounts***

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1. Choose **Lists** menu > **Chart of Accounts**.
2. Select the account you want to deactivate.
3. Choose **Edit** menu > **Edit Account**.
4. In the **Edit Account** window, click **Online Settings**.
5. In the **Online Account Information** window, choose **Not Enabled** from the **Download Transaction** list and click **Save**.
6. Click OK for any dialog boxes that may appear.
7. Repeat steps for each account to be disconnected.

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**Task 5: Reconnect Accounts to *First Federal Lakewood Business Online Banking***

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1. Choose **Banking** menu > **Online Banking Setup**.
2. Enter, then select ***First Federal Lakewood-Bus QBDC*** from the **Financial Institution** list. Click **Next**.
3. Follow the instructions in the wizard. If prompted for connectivity type, select Direct Connect.
4. The Online Banking Assistant window displays during setup. Select "Yes, my account has been activated for QuickBooks online services," then click **Next**.
5. Enter credentials and click **Sign In**.
6. For each account you wish to download into QuickBooks, click Select an Account to choose the appropriate existing account register.

**IMPORTANT:** Do **NOT** select "**New**" under the action column.

7. Click **Next**, then **Done**.
8. Add or match all downloaded transactions in the **Downloaded Transactions** window.