

QuickBooks® Mac Web Connect

Before the 1st Action Date: July 31

- Backup your QuickBooks Mac data file & update the application. Choose **File > Backup**.
- Download the latest QuickBooks Update. Choose **QuickBooks > Check for QuickBooks Updates**.
- Complete a final transaction download. Complete last transaction update before the change to get all of your transaction history up to date.
- Repeat this step for each account you need to update.
- Accept all new transactions into the appropriate registers. (required)

On or After the 2nd Action Date: August 3

- Deactivate online banking connection for accounts connected to Business Online Banking. Choose **Lists > Chart of Accounts**.
- Select the first account you would like to deactivate and choose **Edit > Edit Account**.
- Select **Online Settings** in the Edit Account window.
- In the Online Account Information window, choose **Not Enabled** from the **Download Transactions** list and click **Save**.
- Click **OK** for any dialog boxes that may appear with the deactivation.
- Repeat steps for any additional accounts that apply.
- Reconnect online banking connection for accounts that apply. Log in to your financial institution's online banking site and download your transactions into 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.
- In QuickBooks, choose **File > Import > From Web Connect**. Use the import dialog to import your saved Web Connect file.
- 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.**
- Click **Continue** and **OK** for any dialog boxes that require action.