*WEST*consin Business Connect Converting from QuickBooks Direct Connect to QuickBooks Web Connect

The following instructions will provide you with step-by-step details of converting from QuickBooks Direct Connect to QuickBooks Web Connect in Business Connect. If you have any questions or need additional assistance, please reach out to Business Services directly. If you are a business owner and would like to apply for Business Connect, CLICK HERE. If you are a business that currently uses Business Connect and have questions, CLICK HERE.

INFO

QuickBooks Direct Connect: Allows a business to import account information and use Bill Pay all from within QuickBooks after establishing an initial connection and setting up a Direct Connect password.

QuickBooks Web Connect: Allows a business to import a previously exported file from the business' financial institutions website. Login directly to the financial institution's website is needed to export the file and use Bill Pay.

*WEST*consin Business Connect allows businesses to connect their *WEST*consin Credit Union accounts to QuickBooks via Web Connect only. If previously using WESTconsin Online, a business may have been using Direct connect to reconcile their transaction within QuickBooks and use Bill Pay. To convert from using Direct Connect to using Web Connect, follow the steps below.

CONVERTING PREPERATION

Creating a backup file is recommended in case information is lost in the conversion.

1. **Backup** your data file
   - For instructions to back up your data file, **choose** "**Help**" menu > "**QuickBooks Help**"
   - **Search** for "Back Up" and follow the instructions
   - 2018 Quick Books: Select File > Back Up Company > Create Local Back Up and select the location where you would like to back up your files (CD or Flash Drive)

2. **Download** the latest QuickBooks Update

   - For instructions to download an update, **choose "Help"** menu > "**QuickBooks Help**"

   - Search for "*Update QuickBooks"*, then **select "Update QuickBooks"** and follow the instructions

3. **Switch** to single user mode if multiple users on one account

   - For instructions to switch to single user mode, **choose** "**Help**" menu > "**QuickBooks Help**"

   - **Search** for "Switch to Single User Mode" and follow the instructions

4. **Enable** Classic Mode (Register Mode)

   - For instructions to enable Classic Mode (Register Mode), **choose "Help"** menu > "**QuickBooks Help**"

   - **Search** for "**Banking Feed Modes**", **select** "**Bank Feeds Modes overview**", **scroll down**, and follow the instructions

   - <u>Note</u>: If you are not using Classic Mode (Register Mode), enable it for the conversion. You can change it back after the conversion is complete.

5. **Match** Downloaded Transactions

   - If new transactions were received from your connection, accept all new transactions into the appropriate registers <u>or</u> ignore all. When reconnected, these will show up as unmatched again.
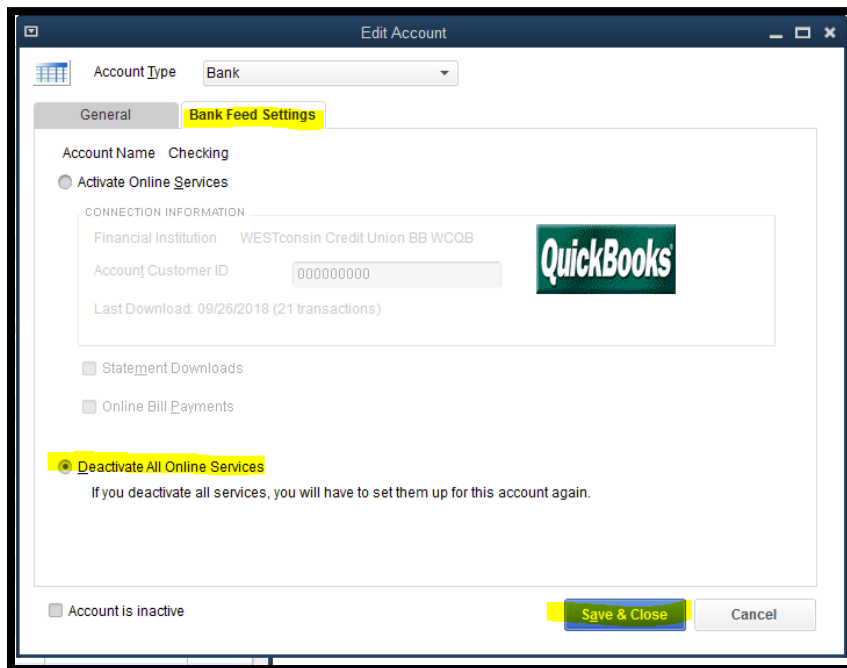
DISCONNECT ACCOUNTS

All accounts converting need to be disconnected from current Direct Connect to reconnect via Web Connect

1. **Choose** the "**Lists**" menu > "Chart of Accounts"

   - All accounts currently will have lightning bolt symbol
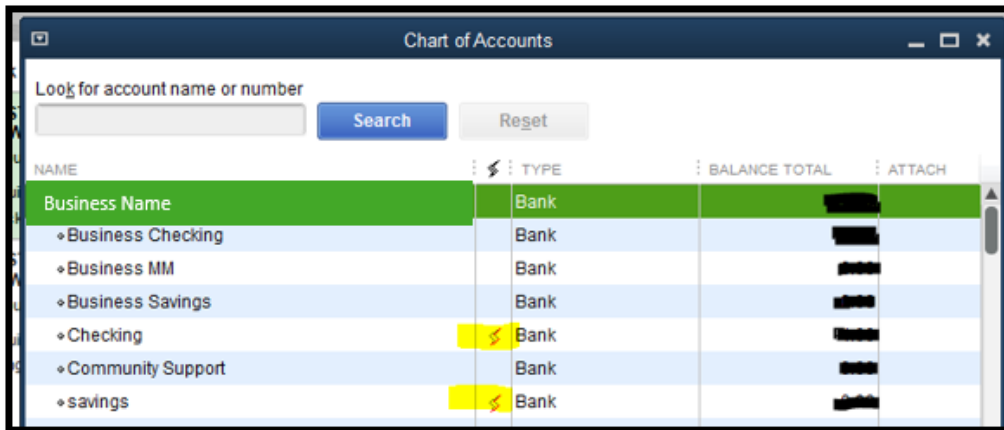
2. **Select** the account you want to deactivate

3. **Right Click** on Account > "Edit" Account

4. **Click** on the Bank Feed "Settings" tab in the Edit Account window

5. **Select** "Deactivate All Online Services" and **click** "Save & Close"

   - If transactions were not previously matched, an error will pop up at this time
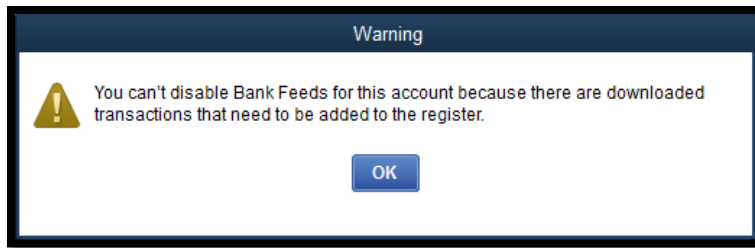
6. **Click** "**OK"** for any dialog boxes that may appear with the deactivation

7. **Repeat** steps for each account to be disconnected

RECONNECT ACCOUNTS

Reestablishing connection via Web Connect through *WEST*consin Business Connect

1. **Login** to *WESTconsin Business Connect* and *download your QuickBooks Web Connect file*
2. Prompt may appear giving you the option to open or save the download.
   - If selecting open, **skip** to step 5
   - If selecting save, **choose** a location to save the file and **continue** to next step
3. **Pull up** Quick Books and **click** "File" > "Utilities" > "Import" > "Web Connect Files"
   - Take note of the date you last had a successful connection. If you have overlapping dates in the Web Connect process, you may end up with duplicate transactions
4. If prompted for connectivity type, **select** Web Connect
5. **Click** the "Import new transactions now" radio button > **click "**OK"

   - If you previously removed the check from the "Always give me the option of saving to a file..." option, then this dialog will not display
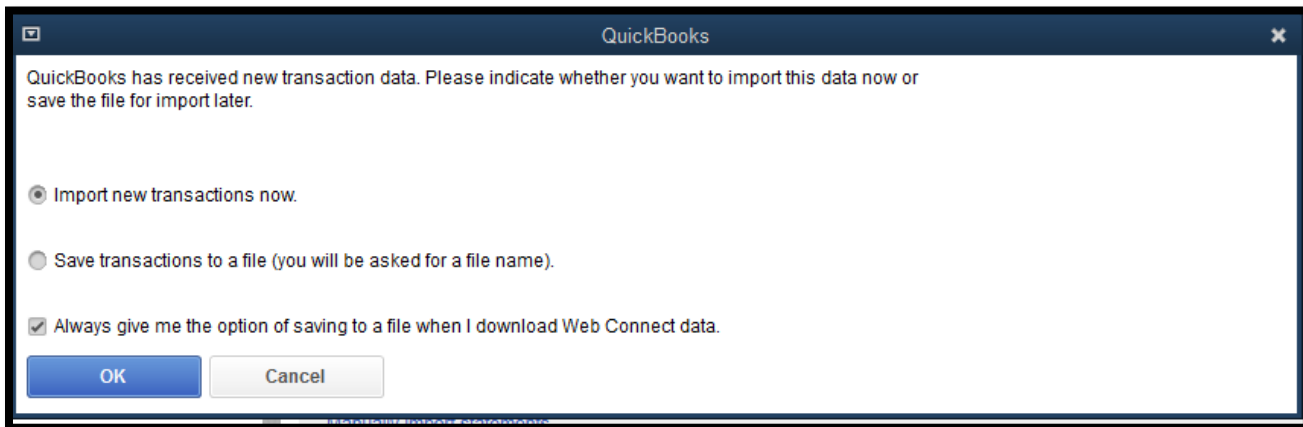
6. In the Select Bank Account dialog, **click** "Use an existing QuickBooks account"

7. In the corresponding drop-down list, **select** your QuickBooks account, and **click "**Continue"

8. **Confirm** the prompt by clicking **"**OK"

9. **Repeat** steps for each account to be reconnected

10. **Verify** that all transactions downloaded successfully into your account registers
    - If succesful, you will see **WESTconsinc Business Connect QB WC** in your list of Bank Accounts

11. (OPTIONAL) **Re-Enable** Express Mode (**Express Web Connect**)
    A. For instructions to enable Express Mode, **choose** "Help" > "QuickBooks Help"
    B. **Search** for **"**Banking Feed Modes", then **select** "Bank Feed Modes overview", and follow the instructions