Byron Bank

QuickBooks Online Web Connect Users

On the 1st Action Date: Friday, September 17, 2021
      1. Complete a final transaction download.
      2. Complete last transaction update before the change to get all of your transaction history up to date.
      3. Accept all new transactions into the appropriate registers.

On the 2nd Action Date: Monday, September 20, 2021
      1. Disconnect online banking connection for accounts connected to financial institution that is requesting this change.
            a. Select **Banking** from the left column.
            b. Click on the account you would like to disconnect, then click the **Pencil** Icon on the corner of that account box.
            c. Click **Edit Account Info**.
            d. Check the box next to **Disconnect this Account on Save**.
            e. Click **Save and Close**.
            f. Repeat steps for any additional accounts that apply.

      2. Reconnect online banking connection for accounts that apply.
            a. Download a Web Connect file (.qbo or .qfx) from your financial institution's online banking site.
            b. In QuickBooks Online, choose **Banking** from the left column.
            c. Click **File Upload** in the upper-right side of the screen and use the upload dialog to locate the Web Connect file you downloaded in step a.
            d. Choose the appropriate account from the drop-down menu under **QuickBooks Account** and then click **Next**.

            Important: Do NOT choose "+Add New" in the drop-down menu unless you intend to add a new account to QuickBooks Online.
            e. When the import is finished, click **Let's go!**
            f. Review the For Review tab on the Banking page to view what was downloaded.
            g. Click **Next**, and then click **Done**.
            h. Repeat this step for each account that you have connected to this institution.