How To Determine Your Quicken Connection Type

Windows:

1. Go to the **Tools** menu.
2. Select **Account List.**
3. Click **Edit** next to your account.
4. Choose the **Online Services** tab at the top.
5. Look for the **Connection Type** section to see your current connection method.

Mac:

1. Choose your account on the left.
2. Click the **Settings** button on the bottom right.
3. Go to the **Downloads** tab.
4. Click the **Connection Type**. The Connection Type will be displayed next to your account.

How To Determine Your QuickBooks Connection Type

1. Open QuickBooks Desktop or QuickBooks Online.
2. Go to the **Banking** menu.
3. Select **Bank Feeds**.
4. Click on **Import Web Connect Files**.
5. Look for the file format in the list. If it's a QuickBooks Online (QBO) file, it's a Web Connect file.

   Note: If you enter your bank login credentials directly within QuickBooks you are using Web Connect. If you do not enter your bank login credentials directly within QuickBooks you are likely using Web Connect.

Overview of Connectivity Types

Web Connect allows you to download transaction files from your online banking environment and import them into QuickBooks. Users must manually download and import files regularly to keep their accounts updated.

Express Web Connect retrieves transactions from your online banking site automatically.

Direct Connect establishes a direct connection between QuickBooks and the bank's servers, allowing users to download transactions without logging into their online banking site. Users initiate updates directly from within QuickBooks.