



QuickBooks Mac Direct Connect

On the 1st Action Date:

1. Backup QuickBooks Mac Data File & Update the Application.
 - a. Choose **File > Backup**.
 - b. Download the latest QuickBooks Update. Choose **QuickBooks > Check for QuickBooks Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers. (required)

On the 2nd Action Date:

1. Deactivate online banking connection for accounts connected to Bank3.
 - a. Choose **Lists > Chart of Accounts**.
 - b. Click the first account you would like to deactivate and choose **Edit > Edit Account**.
 - c. Choose **Online Settings** in the Edit Account window.
 - d. In the Online Account Information window, choose **Not Enabled** from the **Download Transactions** list and click **Save**.
 - e. Click **OK** for any alerts or messages that may appear with the deactivation.
 - f. Repeat steps for any additional accounts that apply.

On the 3rd Action Date:

1. Reconnect online banking connection for accounts that apply.
 - a. Choose **Banking > Online Banking Setup**.
 - b. Type Bank3 in the search field, then click **Next** and follow the instructions in the setup screen.
 - c. Select **Yes, my account has been activated for QuickBooks Online Services** in the Online Banking Assistant window. Click **Next**.
 - d. Enter your Direct Connect credentials. Direct Connect might require credentials that do not match your online banking credentials. Contact your financial institution if your login information does not work.

- e. For each account you wish to download into QuickBooks, click **Select** and **Account** to connect to your existing account's registers.
- f. Click **Next**, and then click **Done**.
- g. Repeat this step for each account that you have connected to Bank3.