



QuickBooks for Mac Conversion Instructions

QuickBooks Mac 2012-2015

Web Connect to Direct Connect

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Introduction

As **Brighton Bank** completes its system conversion, you will need to modify your QuickBooks settings to ensure the smooth transition of your data. To complete these instructions, you will need your **User ID and Password** for the **Brighton Bank** website.

NOTE: For QuickBooks Web Connect accounts, use the same User ID and PIN/Password as your financial institution website. For Direct Connect, the login credentials may be different. Please contact your financial institution to verify your Direct Connect login information.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

IMPORTANT: This update is time sensitive and can be completed on or after **03/23/2015**.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu and use the Search bar available at the top. Search for **Back Up** and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu and use the Search bar available at the top. Search for **Update QuickBooks**, select **Check for QuickBooks Updates** and follow the instructions.

Task 2: Deactivate Your Account(s)

IMPORTANT: All transactions must be matched or added to the register prior to the deactivating of your account(s).

1. Choose **Lists** menu > **Chart of Accounts**.
2. Select the account you want to deactivate.
3. Choose **Edit** menu > **Edit Account**.
4. In the **Edit Account** window, click the **Online Settings** button.
5. In the **Online Account Information** window, choose **Not Enabled** from the **Download Transaction** list and click **Save**.
6. Click **OK** for any dialog boxes that may appear with the deactivation.
7. Repeat steps 2 – 6 for each account at **Brighton Bank**.

Task 3: Re-activate Your Account(s) at Brighton Bank

1. Choose **Banking** menu > **Online Banking Setup**.
2. Select **Brighton Bank** from the **Financial Institution** list and click **Next**.
3. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
4. The Online Banking Assistant window displays during setup. Select **Yes, my account has been activated for QuickBooks online services**, then click **Next**.
5. Enter credentials and click **Sign In**.
6. For each account you wish to download into QuickBooks, click **Select an Account** to choose the appropriate existing account register.

IMPORTANT: Do **NOT** select "New" under the action column.

7. Click **Next**.
8. Click **Done**.
9. Add or match all downloaded transactions in the **Downloaded Transactions** window.

Thank you for making these important changes!