

# How to Connect Your Bank Account to QuickBooks

---

As we complete our digital banking system upgrade, you will need to modify your QuickBooks settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows, Mac, and Online connectivity.

QuickBooks connections will be available starting on August 20, 2024. If you use QuickBooks Desktop (downloaded version), you can link your account directly. Your Web Connect files—QuickBooks (.QBO) will be accessible from online banking. Please note that Intuit aggregation services (for linking your account to QuickBooks) will experience interruptions for up to 5 business days after the new online banking platform is available.

To navigate this document, just click the link below that matches your product and connectivity:

## **Instructions for Downloading a Web Connect file from your Online Banking Site**

[QuickBooks Windows Web Connect](#) - Page 2

[QuickBooks Mac Web Connect](#) - Page 3

[QuickBooks Online Web Connect](#) - Page 4

## QuickBooks Windows Web Connect

### Backup Your Data: (Optional)

1. Backup QuickBooks Windows Data File & Update.
  - a. Choose **File > Back Up Company > Create Local Backup**.
  - b. Download the latest QuickBooks Update. Choose **Help > Update QuickBooks Desktop**.
2. Complete a final transaction download and match downloaded transactions.
  - a. Complete one 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)

### Deactivate and Reactivate Your Vermont Federal Credit Union Connection:

1. Deactivate online banking connection for accounts connected to Vermont Federal Credit Union.
  - a. Choose **Lists** menu > **Chart of Accounts**.
  - b. Right-click the first account you want to deactivate and choose **Edit Account**.
  - c. Click the **Bank Feeds Settings** tab in the Edit Account window.
  - d. Select **Deactivate All Online Services** and click **Save & Close**.
  - e. Click **OK** for any alerts or messages that may appear with the deactivation.
  - f. Repeat steps for any additional accounts that you need to deactivate.
2. Reconnect online banking connection for accounts that you deactivated.
  - a. Log in to Vermont Federal Credit Union's online banking site and download your transactions to a QuickBooks (.QBO) file.
    - i. Navigate to the accounts page and select the account with the transactions you want to download.
    - ii. Press the download arrow. Choose the .QBO file type.

**Note: Take note of your last successful upload.** Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.  
[Learn how to fix duplicate transactions here.](#)
  - b. In QuickBooks, choose **File > Utilities > Import > Web Connect Files**. Locate your saved Web Connect file and select to import.
  - c. In the Select Bank Account dialog select **Use an existing QuickBooks account**.

**Important: Do NOT select "Create a new QuickBooks account" unless you intend to add a new account to QuickBooks.**
  - d. In the drop-down list, choose your QuickBooks account(s) and click **Continue**. Confirm by selecting **OK**.

## QuickBooks Mac Web Connect

### Backup Your Data (Optional)

1. Backup your 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. Repeat this step for each account you need to update.
  - c. Accept all new transactions into the appropriate registers. (required)

### Deactivate and Reactivate Your Vermont Federal Credit Union Connection:

1. Deactivate online banking connection for accounts connected to Vermont Federal Credit Union.
  - a. Choose **Lists > Chart of Accounts**.
  - b. Select the first account you would like to deactivate and choose **Edit > Edit Account**.
  - c. Select **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 dialog boxes that may appear with the deactivation.
  - f. Repeat steps for any additional accounts that apply.
2. Reconnect online banking connection for accounts that apply.
  - a. Log in to Vermont Federal Credit Union's online banking site and download your transactions into to a QuickBooks (.qbo) file.
    - i. Navigate to the accounts page and select the account with the transactions you want to download.
    - ii. Press the download arrow. Choose the .QBO file type.  
**Important: Take note of your last successful upload.** Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.  
[Learn how to fix duplicate transactions here.](#)
  - b. In QuickBooks, choose **File > Import > From Web Connect**. Use the import dialog to import your saved Web Connect file.
  - c. In the Account Association window, click **Select an Account** to choose the appropriate existing account register.  
**Important: Do NOT select "NEW" under the action column unless you intend to add a new account to QuickBooks.**
  - d. Click **Continue** and **OK** for any dialog boxes that require action.

## QuickBooks Online Web Connect

### Backup Your Data: (Optional)

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.

### Deactivate and Reactivate Your Vermont Federal Credit Union Connection:

1. Disconnect online banking connection for accounts connected to Vermont Federal Credit Union.
  - 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 Vermont Federal Credit Union online banking site.
    - i. Navigate to the accounts page and select the account with the transactions you want to download.
    - ii. Press the download arrow. Choose the .QBO or .QFX file type.
  - 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 Vermont Federal Credit Union