

For online banking, including credit cards, financial institutions allow QuickBooks to connect to their computers in two ways: Web Connect or Direct Connect

With WebConnect, you visit the financial institution's Web site to download transactions.

After you set up your account, you can:

Use QuickBooks to access your financial institution's Web site.

Manually download transactions from the Web site and then import them into QuickBooks.

or

Directly, without having to use a Web browser from inside QB, for both sending and receiving information (DirectConnect).

With DirectConnect, QuickBooks downloads transactions directly from the financial institution's servers, without using a Web browser.

After you set up your account, you can:

Use QuickBooks to securely download transactions.

Use other types of online services with the account, if your financial institution supports them. These services may include online vendor payment, online transfers between accounts, and e-mail to the financial institution.

Your financial institution should tell you which method you will use in the information package that contains your Customer ID, password, and other sign in information.
Online Banking & QuickBooks using Direct Connect.

1. Activate online services at your financial institution (bank and credit card accounts)
2. Go to Banking, Online Banking, Online Banking center. Follow instructions to add your bank.
3. When you are ready to import transactions from your bank or credit card, go back to online banking center, click receive transactions.
4. Once complete, click on the account name in the items received section. This opens a window where you will match the transactions.

Online Banking & QuickBooks using Web Connect

1. Activate online services at your financial institution (bank and credit card accounts)
2. Go to your bank's website and login
3. Locate the 'download' link
4. When the download starts, your Web browser may ask if you want to Open or Save a .QBO file
5. Click Save, and browse to a save location (desktop suggested) Note, delete the file from your desktop once task completed
6. Go back to QuickBooks and click, file, utilities, import, web connect file, browse for file and click ok.

When QuickBooks finishes processing the transactions, they appears in the Items Received list in the Online Banking Center.

7. Match the transactions, click Done.