

# Online Banking Direct Connect to Web Connect Conversion QuickBooks Windows 2009-2012

As United Savings Bank completes its system conversion, you will need to modify your QuickBooks settings to ensure the smooth transition of your data. You will need to be able to log in to the Web site.

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



This update is time sensitive and can be completed on or after **January 23, 2012**.



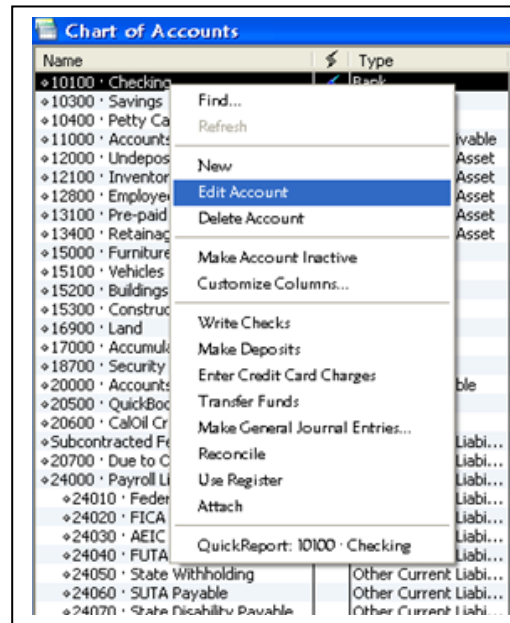
**Note:** The QuickBooks Windows Online Banking module has not changed. The product interface may look different; however the steps that follow will work for all versions of QuickBooks 2009-2012.

## BACK UP YOUR CURRENT DATA

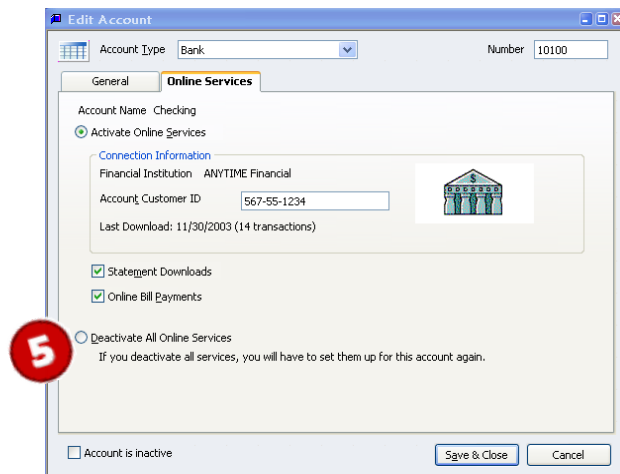
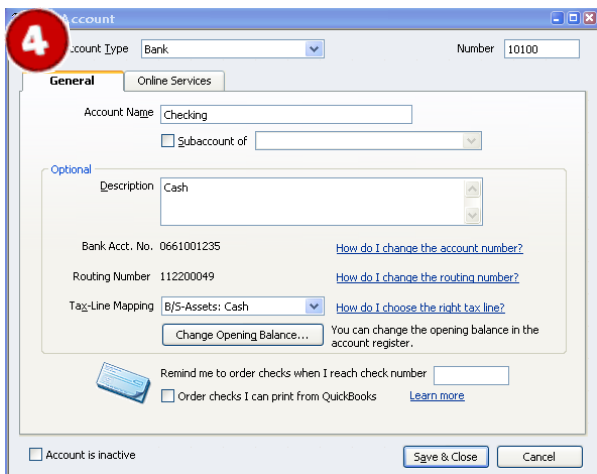
1. Choose File menu → Back Up
2. Specify which file to back up and where you want the backup saved in the QuickBooks Backup dialog, and then click OK

# DEACTIVE ONLINE BANKING

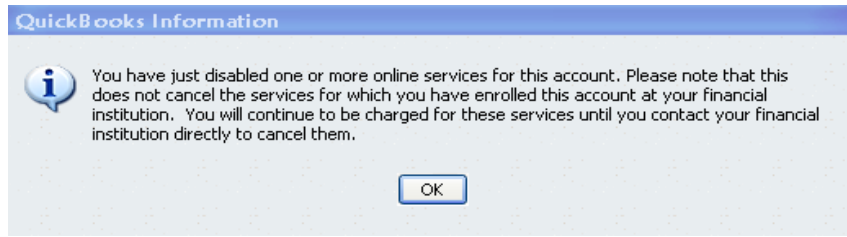
1. Choose Lists menu → Chart of Accounts.
2. Right-click your first account.
3. Select Edit Account



4. In the Edit Account window, click the Online Info tab. Edit Account Number, Routing Number, etc. as needed.



5. Select the radio button Deactivate All Online Services
6. Click Save & Close → a QuickBooks Information box will prompt → click OK to continue



7. Repeat steps 2 through 7 for each account from which you download

## ACTIVATE YOUR ACCOUNT with WEB CONNECT

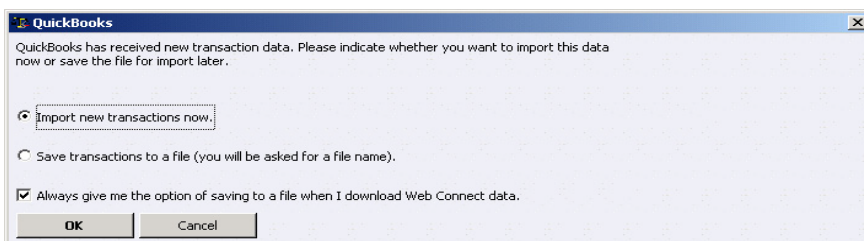
**IMPORTANT:** Do not complete this section until after the conversion.

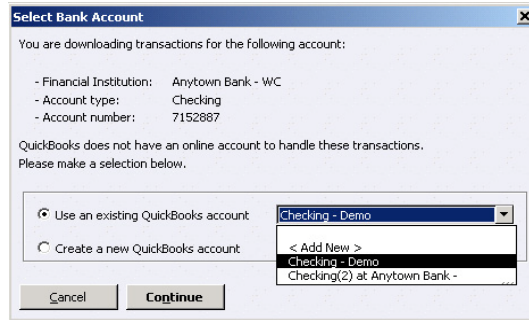


1. Log in to unitedsavingsbank.com Web site. Download your transactions into QuickBooks.



**Important:** To avoid the possibility of creating duplicate records when downloading into QuickBooks, select a “from” date that does not include records previously downloaded.





2. In QuickBooks, click the Import new transactions now radio button. Then click OK.



Note: If you previously removed the check from the Always give me the option of saving to a file... option, then this dialog will not display.

3. In the Select Bank Account dialog, click the Use an existing QuickBooks account radio button. In the corresponding drop-down list, select the QuickBooks account that you use. Click Continue.



Note: You only need to select the account for this first download. Future downloads apply to this account automatically.

4. Confirm the prompt by clicking OK.
5. Repeat steps 1 through 3 for each account that you previously disabled.



Verify that all transactions downloaded successfully into your account registers.

**Thank you for making these important changes!**