# Online Banking Web Connect Conversion
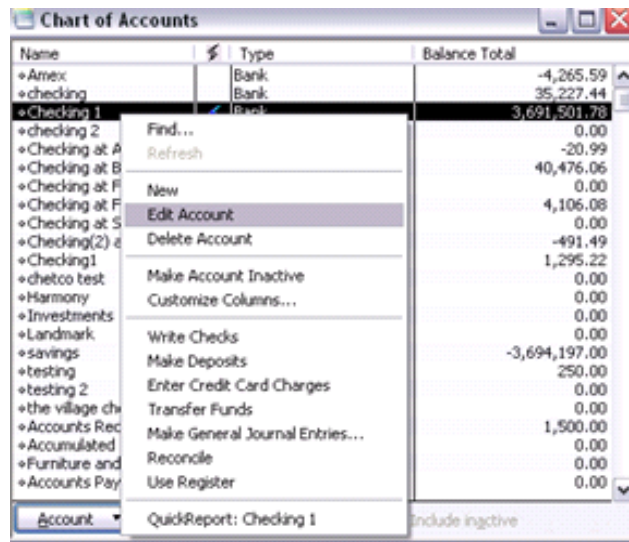# QuickBooks Windows 2008-2011

**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 2008-2011.
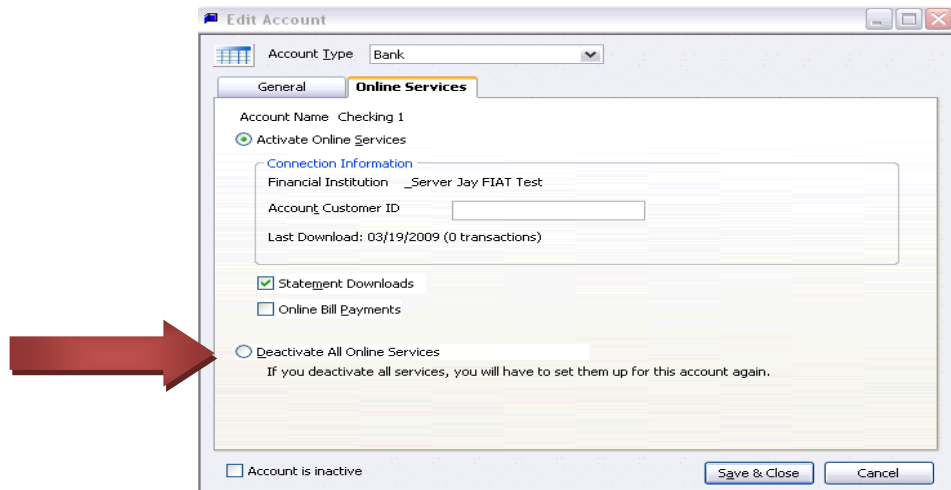
# BACK UP YOUR CURRENT DATA

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

# DEACTIVATE YOUR ACCOUNT FROM WEB CONNECT

1. Choose Lists menu ➔ Chart of Accounts

2. Right-click your account

3. Select Edit Account from the pop-up menu

**4.** In the Edit Account window, click the Online Services  tab and choose Deactivate All Online  Services



**5.** Repeat steps **2** through **4** for each account from which you download transactions.
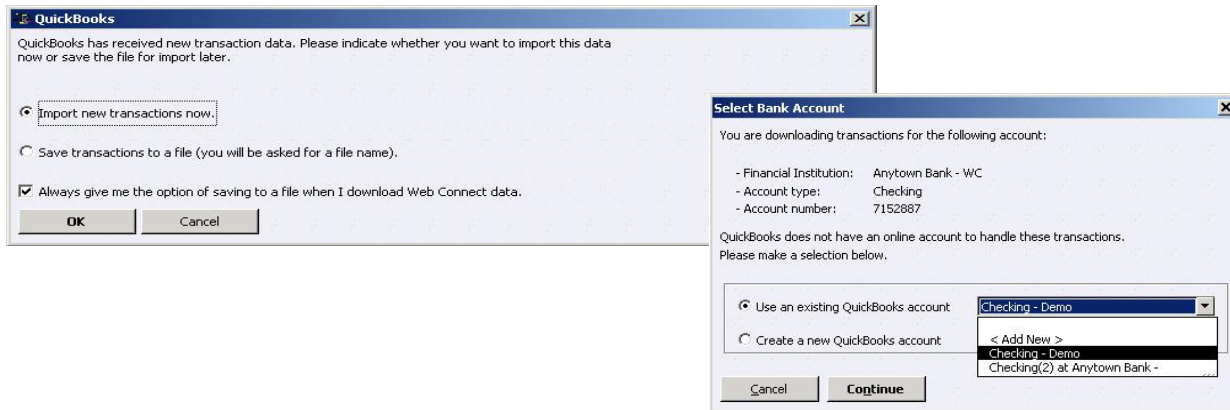
## ACTIVATE YOUR ACCOUNT FROM WEB CONNECT

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

**1.** Log in to your financial institution's 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!

WC_WC Customer Conversion Guide
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