QuickBooks for Windows
Conversion Instructions

Beginning 6/22/2018, you will be able to reconnect to your First United Bank accounts in the new online banking system with your Intuit products (QuickBooks, Quicken, Mint, etc.).

Direct Connect

Task 1: Disconnect Accounts at *First United Bank & Trust*

> **NOTE:** All transactions must be matched or added to the register prior to deactivating 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. Click on the **Bank Feed Settings** tab in the **Edit Account** window.

5. Select **Deactivate All Online Services** and click **Save & Close**.

6. Click OK for any dialog boxes that may appear with the deactivation.

7. Repeat steps for each account to be disconnected.

Task 2: Reconnect Accounts to *First United Bank & Trust* on or after *6/22/2018 (this refreshes the system)*

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1. Choose **Banking** menu > **Bank Feeds** > **Set Up Bank Feed for an Account**.

2. Enter, then select *First United Bank & Trust*. Click Next.

3. If prompted for connectivity type, select **Direct Connect**.

4. Link your bank accounts with the existing QuickBooks accounts and click **Connect**.

Re-enable Express Mode (if necessary)

> **NOTE:** If you prefer Classic Mode (Register Mode), you are finished with your conversion. If you use Express Mode for online banking, you may now re-enable the mode.

For instructions to enable Express Mode, choose **Help** > **QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

Task 3: Recreate Online Payments

If you do not use Bill Pay within QuickBooks, your conversion is complete. If you use online bill payments from within QuickBooks, you will now want to recreate your online bill payments.

For assistance in recreating payments, choose Help menu > QuickBooks Help. Search for Pay A Vendor Online and follow the instructions.

Direct Connect to Direct Connect

Beginning 6/22/2018, you will be able to reconnect to your First United Bank accounts in the new online banking system with your Intuit products (QuickBooks, Quicken, Mint, etc.).

Task 1: Disconnect Accounts at *First United Bank & Trust*

NOTE:	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 **Online Settings**.

5. In the Online Account Information window, choose **Not Enabled** from the **Download Transactions** list and click **Save**.

6. Click OK for any dialog boxes that may appear with the deactivation.

7. Repeat steps for each account to be disconnected.

Task 2: Reconnect Accounts to *First United Bank & Trust* on or after *6/22/2018 (this refreshes the system)*

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1. Choose **Banking** menu > **Online Banking Setup**.

2. Enter, then select *First United Bank & Trust* from the **Financial Institution** list. 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 connect to the appropriate existing account register.

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

7. Click **Next**, then **Done**.

8. Add or match all downloaded transactions in the Downloaded Transactions window.