

QuickBooks Direct Connect Instructions for Windows



QuickBooks Windows 2013+ Direct Connect

Introduction

Riverview is excited to offer QuickBooks Direct Connect. You will need to modify your QuickBooks settings to ensure the smooth transition of your data. To complete these instructions, you will need your **User ID and Password** for **RiverviewBank.com**.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 1: Connect and Update Your Data

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **QuickBooks Help**. Search for **Back Up** and follow the instructions.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu > **QuickBooks Help**. Search for **Update QuickBooks**, then select **Update QuickBooks** and follow the instructions.

NOTE: If multiple computers do not use the same QuickBooks data file, skip step 3. QuickBooks activities such as **Online Banking** cannot be performed in multi-user mode because of the way the activities interact with a company data file.

3. Switch to single user mode. For instructions to switch to single user mode, choose **Help** menu > **QuickBooks Help**. Search for **Switch to Single User Mode** and follow the instructions.

Task 2: Deactivate Your at **Riverview Community Bank** Account(s)

NOTE: All transactions must be matched or added to the register prior to deactivating your account(s).

1. Choose the **Lists menu** > **Chart of Accounts**.
2. Select the account you want to deactivate.
3. Click **Edit menu** > **Edit Account**.
4. Click on the **Online Services** tab in the Edit Account window. The tab is named **Bank Feed Settings** in QuickBooks 2014 and newer.
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 2 – 6 for each account at *Riverview Community Bank*.

Task 3: Setting up an Account for Direct Connect at *Riverview Community Bank*.

1. Choose **Banking** menu > **Bank Feeds** > **Set Up Bank Feeds for an Account**
2. On the **Step 1: Find your bank** screen, type *Riverview Community Bank - WA* in the entry field. When that appears in the filter results, click it..

IMPORTANT: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

3. Enter your credentials and click **Connect** to connect to your bank.
4. After you connect, you will see all accounts at your financial institution that you can add to QuickBooks. If you don't have an account ready in QuickBooks, click **<Create New Account>** to create a new account. If you don't want to download data from a particular account, choose **Do not add to QuickBooks** from the drop-down menu.
5. After you add your accounts, click **Close**