

QuickBooks Online Conversion Instructions

Instructions for One-Step Update initiated from within QuickBooks Online

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QuickBooks Online Express Web Connect

Disconnect online banking connection for accounts connected to Westerra that is requesting this change.

1. Select Banking from the left column.
2. Click the account you want to disconnect, then click the Pencil Icon on the corner of that account box.
3. Click Edit Account Info.
4. Check the box next to Disconnect this Account on Save.
5. Select Save and Close.
6. Repeat steps for any additional accounts that apply.

Reconnect Accounts

1. Reconnect online banking connection for accounts that apply.
 - a. On the Banking page, click **Add Account** in the upper-right side of the screen.
 - b. Type "Westerra Credit Union" and choose the correct option from the results.
 - c. Enter your Westerra Digital Banking credentials and click **Continue**. Express Web Connect uses the same credentials you use for your Westerra Digital Banking account.
 - d. Provide additional information, if requested.
 - e. Ensure you associate the accounts for Westerra to the appropriate account already listed under Which accounts do you want to connect? Choose the matching accounts in the drop-down menu.

Important: Do NOT select "+Add New" unless you intend to add a new account to QuickBooks Online. If you are presented with accounts you do not want to track in this QuickBooks Online Company, Uncheck the box next to the Account Name.

- f. After all accounts have been matched, click **Connect** and then click **Finish**.
2. Exclude Duplicate Transactions.
 - a. Select **Banking** from the left column.
 - b. In the For Review section, click the checkboxes for the transactions you want to exclude.
 - c. Choose **Batch Actions > Exclude Selected**.

QuickBooks Online Web Connect

1. Disconnect online banking connection for accounts connected to Westerra
 - a. Select **Banking** from the left column.
 - b. Click on the account you would like to disconnect, then click the **Pencil** icon on the corner of that account box.
 - c. Click **Edit Account Info**.
 - d. Check the box next to **Disconnect this Account on Save**.
 - e. Click **Save and Close**.
 - f. Repeat steps for any additional accounts that apply.
2. Reconnect online banking connection for accounts that apply.
 - a. Download a Web Connect file (.qbo or .qfx) from your Westerra Digital Banking account
 - b. In QuickBooks Online, choose **Banking** from the left column.
 - c. Click **File Upload** in the upper-right side of the screen and use the upload dialog to locate the Web Connect file you downloaded in step a.
 - d. Choose the appropriate account from the drop-down menu under **QuickBooks Account** and then click **Next**.

Important: Do NOT choose "+Add New" in the drop-down menu unless you intend to add a new account to QuickBooks Online.
 - e. When the import is finished, click **Let's go!**
 - f. Review the For Review tab on the Banking page to view what was downloaded.
 - g. Click **Next**, and then click **Done**.
 - h. Repeat this step for each account that you have connected to Westerra