QUICK REFERENCE:
QUICKBOOKS EXPORT / BREAKING THE CHAIN (PC)

QuickBooks Windows 2010-2013

Web Connect

Task 1: Deactivate Your Account(s)

IMPORTANT:	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. Left click the account you want to deactivate.
3. Click **Edit** on the menu →click **Edit Account**.
4. In the Edit Account window, click on the **Online Services** tab.
5. Select **Deactivate All Online Services** → click **Save & Close**.
6. Click **OK** for any messages.
7. Repeat steps 2 – 6 for each account at Salin Bank.

NOTE: After Deactivating all accounts, exit QuickBooks then re-open. Then open all **Chart of Accounts** and **Activate** online services.

Task 2: Re-activate Your Account(s) at Salin Bank

IMPORTANT:	You will need your Business E-Banking User ID and Password for to complete the following steps.

1. Log in to ***Salin Bank's*** web site at ***www.salin.com***. 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 **Use an existing QuickBooks** account radio button.

4. In the corresponding drop-down list, select your QuickBooks account, and click **Continue**.
5. Confirm the prompt by clicking **OK**.

   Repeat steps 1 through 5 for each account that you previously disabled.

NOTE:	Verify that all transactions downloaded successfully into your account registers.

Task 3: Re-enable Side by Side mode (if necessary)

If you use the Side by Side mode for online banking, follow these steps to enable it. If you prefer register mode, you are finished with your conversion.

1. Enable Side by Side mode. For instructions to enable Side by Side mode, choose **Help** menu → **QuickBooks Help**.
2. Search for **Online Banking Modes**, select **Online Banking Modes overview** and follow the instructions.

Thank you for making these important changes!