USING QUICKBOOKS® DIRECT CONNECT & WEB CONNECT

QuickBooks® uses two ways to download from and interact with your bank:

- **Web Connect** is, simply put, a way you can download your transactions directly from your bank's website and import them into QuickBooks®.
- With **Direct Connect**, QuickBooks® communicates directly with WestStar on your behalf. You do not need to sign in to WestStar online banking and manually download transactions - QuickBooks® does this for you.

I currently have an account. How do I know what method I am using?

- Choose the **Tools** menu in the upper left then select **Account List**. Click **Edit** next to your account, then choose the **Online Services** tab at the top.
- On a **Mac**, choose your account on the left, then click **Settings** on the bottom right.

How do I change the connection method from Web Connect to Direct Connect?

QuickBooks® does not allow users to have both Web Connect and Direct Connect linked to the same account at the same time. To switch to Direct Connect:

1. Begin by making sure all of the downloaded transactions have been matched or deleted for the Web Connect account. QuickBooks® will not allow you to make changes if there are still pending transactions.
2. Once completed, you can then disconnect the account using the steps below:

QuickBooks® Desktop for Windows:
3. Go to **Lists** in the top menu, then **Chart of Accounts**.
4. Right-click the account you want to deactivate, then choose **Edit Account**.
5. Go to the **Bank Settings** tab.
6. Press **Deactivate all online services** and then **OK** to confirm.
7. Hit **Save & Close**.
8. The last step is to connect your bank through Direct Connect.

QuickBooks® for Mac:
1. Go to **Lists** in the top menu, then **Chart of Accounts**.
2. Highlight the account and select the **pencil** icon to edit.
3. Select **Online Settings**.
4. In the **Download Transactions** drop-down menu, choose **Not enabled**.
5. Hit **OK** to confirm, then press **OK** to close the window.
6. The last step is to connect your bank through Direct Connect.

How do I connect my account with Direct Connect?

For Windows:
1. From **Banking**, go to **Bank Feeds**.
2. Select **Set up Bank Feeds for an account**.
3. In the **Enter your Bank's name** field, enter and select WestStar.

If you are enrolling for the first time, select the **Enrollment site** link.

If you are already enrolled:
1. Select **Continue**.
2. Enter your online banking Login ID and Password.
3. Select **Connect** to connect your QuickBooks® account.
4. Select the bank account you want to connect. **[Note: You can only link one QuickBooks® account per online banking account.]**
5. Select **Finish** after the connection finishes.

For Mac:
1. Within QuickBooks®, go to **Banking**, then select **Online Banking Setup**.
2. Enter your bank's name, then select **Next**.
3. Select **Direct Connect**, then **Next**.
4. For QuickBooks® online services, select **Yes**, then **Next**.

If you selected **Yes and you're asked to sign in**:
1. Sign in with your online banking credentials.
2. Select **Select an Account** to display the list of available QuickBooks® accounts.
3. Select which QuickBooks® account you wish to link with your bank account. **[Note: You can only link one QuickBooks® account per online banking account.]**
4. Select **Next** to download your transactions.
5. Once QuickBooks® is done with the download, select **Finish**. This displays your downloaded transactions.

If you selected **Yes and you're asked to select an account type**:
1. Select the account type for the account you wish to download.
2. Enter your account number. If this is a banking account, enter the routing number.
3. Select **Select an Account** to display the list of available QuickBooks® accounts.
4. Select which QuickBooks® account you wish to link with your bank account. **[Note: You can only link one QuickBooks® account per online banking account.]**
5. Sign in with your online banking credentials.
6. Once QuickBooks® is done with the download, select **Finish**. This displays your downloaded transactions.

How do I connect my account with Web Connect?

To activate a Web Connect account:

1. From the **Banking** menu, select **Bank Feeds**, then **Import Web Connect Files.**
2. Select the QBO file you saved, then select **Open.**
3. When prompted to Select Bank Account, select:
4. **Use an existing QuickBooks® account** if the account you are importing transactions into is already set up in QuickBooks®.
5. **Create a new QuickBooks® account** if the account you are importing transactions into is not in QuickBooks® yet.
6. Select **Continue**. You will see a dialogue box telling you the data has been successfully read into QuickBooks®. Select **OK**.
7. Go to the **Bank Feeds Center** to review your transactions.