

Connecting QuickBooks: Windows

WyHy Digital: Online & Mobile Banking



QuickBooks stores all data on a cloud-based server that is updated each time you make a transaction. Because of this, it's a bit complicated to restore files to a specific timeframe. We'll walk you through how to manually update this for accuracy!

Step 1: Backup & Update

- 1** To backup your Windows data file, log in to QuickBooks and click **File, Back Up Company**, and then **Create Local Backup**.
- 2** Download the latest QuickBooks update if there is one. Click **Help**, then **Update QuickBooks Desktop**.
- 3** Complete one last transaction update before the change to get all of your transaction history up to date. After you accept all new transactions into the appropriate registers (*required*), Step 1 is complete!

Step 2: Deactivate Accounts

- 1** Click the **Lists** menu, then **Chart of Accounts**. When your accounts populate, right-click the first account you want to deactivate and choose **Edit Account**.
- 2** Click **Bank Feeds Settings** tab in the **Edit Account** window, and select **Deactivate All Online Services**. Click **Save & Close**.
- 3** Click **OK** for any alerts or messages that appear during deactivation. Repeat for any other accounts you need to deactivate.

Step 3: Reactivate Accounts

- 1** Log in to **WyHy Digital Online** (www.WyHy.org) and download your transactions to a QuickBooks (.gbo) file. *Take note of your last successful upload to reduce duplicates.*
- 2** In QuickBooks, go to **File, Utilities, Import**, and **Web Connect Files**. Locate your saved file and select **Import**.
- 3** In the **Select Bank Account** box, select **Use An Existing QuickBooks Account**. *Do not Create a New QuickBooks Account unless you're adding a new account.* In drop-down list, choose your account, click **Continue**, and then confirm.