

# BUSINESS ONLINE BANKING QUICK REFERENCE GUIDE

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## QUICKBOOKS, QUICKEN, AND MINT USERS





## QUICKBOOKS UPGRADE INSTRUCTIONS

As Wilson Bank & Trust completes its system upgrade, you will need to modify your QuickBooks settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac, and both connectivity types (Direct Connect and Web Connect).

These instructions refer to two "Action Dates." The 1st Action Date and 2nd Action Date in the instructions are being provided to you by Wilson Bank & Trust.

### **1<sup>st</sup> Action Date: Tuesday, May 7, 2024**

A data file backup and a final transaction download should be completed by May 7. Please make sure to complete the final download before this date since transaction history might not be available after the upgrade to your business online banking experience

### **2<sup>nd</sup> Action Date: Wednesday, May 8, 2024**

This is the action date for the remaining steps on the upgrade instructions. You will complete the deactivate/reactivate of your on line banking connection to ensure that you get your current Quicken or QuickBooks accounts set up in your new online banking experience.

## Upgrade Instructions:

QuickBooks - [click here](#)

QuickBooks Express Web Connect - [click here](#)

Quicken - [click here](#)

Quicken Express Web Connect - [click here](#)

Direct Connect - [click here](#)

Mint - [click here](#)

Please carefully review your downloaded transactions after completing the reconnection instructions to ensure no transactions were duplicated or missed on the register. If you have any questions, please contact us at **(844) 928-2265**.