9. After creating a new account, you may need to click **Select an Account** again and select the new account.

10. When done, click **Next** at the bottom.

11. You will receive a message that you have successfully set up your accounts.

12. Click **Close** to return to the Downloaded Transactions window.

Updating Accounts

Updating an Account (Direct Connect)

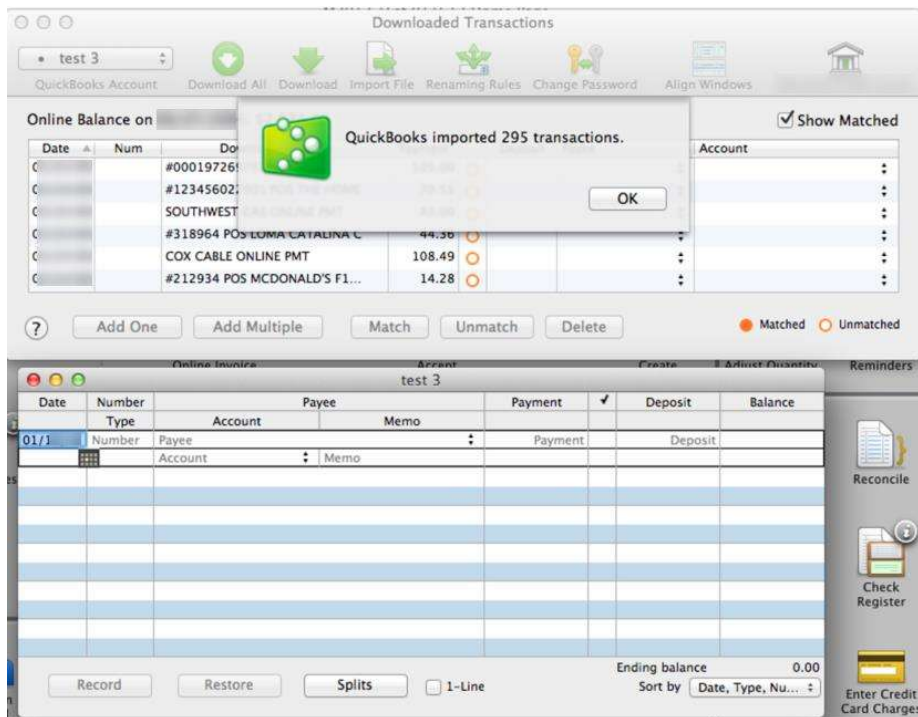1. Choose Banking menu > Downloaded Transactions.
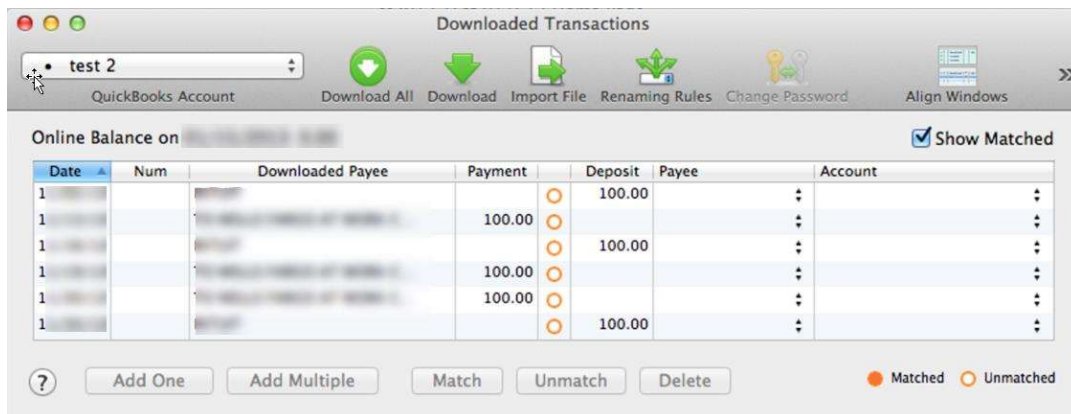
2. Click **Download** to update only the selected account, or **Download All** to update all of your accounts activated for online banking.

3. QuickBooks will open a window to enter the account PIN or password supplied by your financial institution. Enter this and then click **OK**.

> **NOTE:** You can choose to add your online banking password to your Mac OS Keychain. Intuit does not recommend saving your online banking password in this manner.

4. QuickBooks will then connect and synchronize online banking transactions with the financial institution.

5. QuickBooks will give you a count of how many transactions were imported. Click **OK** to continue.

6. QuickBooks will then return to the Downloaded Transactions window and open the register for the selected account so that you can begin the transaction matching process.

Updating an Account (Web Connect)

1. Choose the **Banking** menu > **Downloaded Transactions**.

2. Select the Web Connect account you want to update in the upper left corner. Then click **Download**.
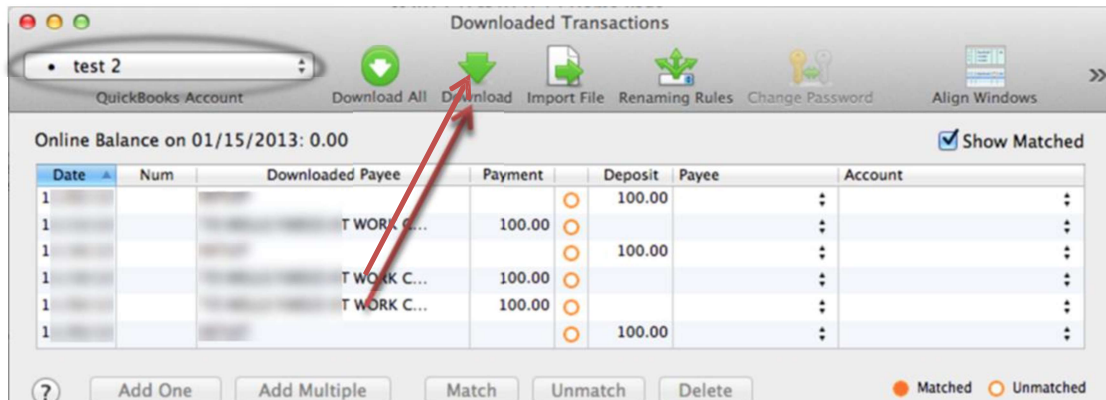

> **NOTE:** For Web Connect accounts, QuickBooks will open your financial institution (FI) website. Log in and download the QuickBooks web connect file (*.QBO) per the financial institution's instructions. Alternately, you can log into the FI website outside of QuickBooks and follow the steps below.

3. When you begin the web connect download from the FI website, your web browser should give you the option to either "open" the file or "save" it.
   - If you open it, QuickBooks will take over and begin the import process.
   - If you save it, you can import it later using the Import File button in the

4. QuickBooks will then import the online banking transactions.

5. When done, QuickBooks will give you a count of how many transactions were imported. Click **OK** to proceed.

6. QuickBooks will then return to the Downloaded Transactions window and open the register for the selected account so that you can begin the transaction matching process.

Special Note 1: Matching and Adding Transactions

1. Choose **Banking** menu > **Downloaded Transactions**.
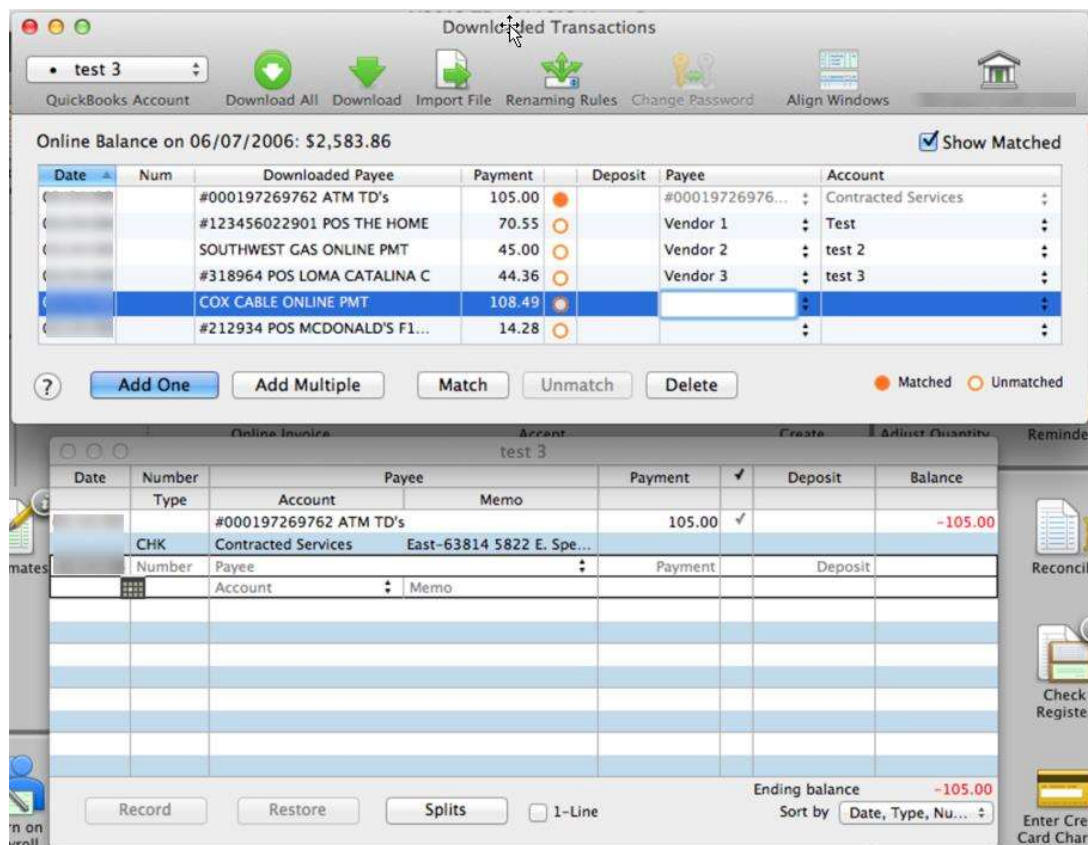
2. Click the **QuickBooks Account** menu and choose the account you want to import into.

3. Use the buttons at the bottom of the Downloaded Transactions window to add downloaded transactions to the account register. You can add multiple transactions at once, match them to transactions already in the register, and more.

4. For detailed instructions on how to match and add transactions go to the QuickBooks Help menu. Use the search field at the top to search for "Match Transactions," then select the article **Online Banking: Updating your Register**.