

Important Update: QuickBooks/Quicken Direct Connect & Web Connect Services

We want to let you know about an upcoming change to the way QuickBooks/Quicken connects with your accounts.

The Direct Connect and Web Connect features in QuickBooks/Quicken will not be accessible starting at 4PM on October 10 until October 21. Please back up your data prior to October 10. During this time, you will not be able to automatically download transactions straight into QuickBooks/Quicken Online or Desktop. Instead, you'll continue to have full access to your account information through our digital banking platform and can easily bring that data into QuickBooks/Quicken by using a simple export/import process until October 21.

Here's what this change means for you:

- You'll still be able to download your transactions from online banking in QuickBooks/Quicken-friendly file formats (such as .QBO, .OFX, or .CSV).
- Once downloaded, those files can be imported into QuickBooks/Quicken with just a few clicks.
- This change does not affect your ability to view, search, or download transaction history within our digital banking platform.

We understand this is a change from what you're used to, and we're here to make the transition as smooth as possible. We've provided instructions below so you can continue managing your finances with ease.

We will have full instructions how to reconnect when the integration is available on October 21.

Instructions:

Quick steps

1. Export the OFX from your bank for the date range you want.
2. Sign in to QuickBooks/Quicken Online.
3. Go to Banking (or Transactions → Banking) → Link account ▼ → Upload from file (or use Accounting → Upload transactions manually).
4. Select the .ofx file, pick the QuickBooks/Quicken account (or Add New), and continue.

5. Match/map columns if prompted, check amounts (use Reverse all values if credits/debits are flipped), then import.
6. Review the uploaded transactions on the Bank transactions / For review page — then Add / Match / Categorize and reconcile.

Please visit intuit.com for more information and resources.