# Import the QuickBooks Online Banking Web Connect file into QuickBooks

## Detailed Instructions (for Quickbooks 2010)

**To import transactions for the first time:**

1. Select the **Banking** menu and then select **Online Banking** and **Setup Account for Online Services**.
2. Select Bank Account from the list and click **Next**. Select your financial institution from the drop down or Enter the name of your Financial Institution (**Platinum Federal Cu**). If you don't see **Platinum Federal Cu** in the list, the financial institution list is probably not updated, click on **"What if my Financial Institution is not listed?"** this will bring up the help bar and under that click on "**Update the financial institutions list**". After the automatic update completes, try to enter the financial institution name again **"Platinum Federal Cu".**
3. Click Next and then click on **Go to My Bank's website**.
4. Login to Platinum FCU's Home Banking website using your login and password. Click on your checking account for which you want to download the transactions.
5. Select appropriate date range you want to download the transactions for and click search
6. Once your transactions are updated for the selected date range, from the drop down menu of **Export to** Select **Quickbooks (.qbo)** and click Download.
7. Select the **Open** from the **File Download** Pop up Screen and then select **Import> From Web Connect**.
8. When QuickBooks finishes importing transactions, click **OK**. QuickBooks displays the transactions in the **Downloaded Transactions** window.
9. Proceed to updating your register.

If you want to download ATM, GA Lottery or Payroll account history follow the above steps again and link your other accounts for Quickbooks web connect download.

If you want to link a different QuickBooks account to imported transactions, you must disassociate the currently associated account first.

**Note:** You must accept or delete any transactions still displayed in the Downloaded Transactions window before disassociating an account.

**To disassociate an account:**

1. Select the **Lists** menu and then select **Chart of Accounts**.
2. Select the account you wish to unlink from imported online transactions, and then select **Edit** from the **Action** pop-up menu.
3. Click **Online Settings**.
4. Click the **Download Transactions** drop-down arrow.
5. Select **Not enabled**, and then click **Save**.
6. In the **Edit Account** window, click **OK**.