

## Quickbooks Personal Online Banking to Business Online Banking

### To Disconnect an Account:

1. **Transactions > Banking,**
2. Select the account you want to change, and then click the **pencil icon** in the blue box to the right of the bank name.
3. Select **Edit Account Info**
4. In the Account window, check the box that says **Disconnect this account on save.**
5. Click **Save** and this will bring you back to the **Downloaded Transactions** page.

The account stays in QuickBooks Online, but is not connected to FirstBank or automatically downloading transactions.

### To Connect an Account:

1. Choose **Transactions > Banking.**
2. In the upper right-hand corner, click **Add Account.** (Note: If all accounts are being changed, Quickbooks may default to Step 3 below)
3. Enter **FirstBank Online – Cash Management** in the financial institution search bar, then click **Find.**
4. Click the link for **FirstBank Online – Cash Management/ [www.firstbankonline.com](http://www.firstbankonline.com)** (You may have to scroll down to view the link).
5. Enter the primary user's internet banking login credentials (for the business site) and click **Log In.**
6. If any challenge questions are asked, enter the answer and click **Log In.**
7. Check the box to the left of the account you want to connect and click the **Quickbooks Account** drop-down menu to choose the Quickbooks Account (this is from your Chart of Accounts). If you don't have the account created, you can click **+Add New** at the very top and create the account.
8. Click **Connect.** This will take a few minutes. When it is finished connecting, click the blue **That's it, I'm finished!** button.
9. After your download finishes, click the **New Transactions** tab to see what was downloaded.

**Note:** When you first connect your account, QuickBooks downloads the last 90 days of transactions and going forward, will automatically download your data nightly. For a shorter length of time, click **Need a shorter date range.** If your Quickbooks is current, it is suggested that you select a shorter date range to avoid duplicate entries.