

## Quickbook (Online) Guide

### Step 1: Match Downloaded Transactions

- If new transactions were received from your connections, accept all new transactions on the **Transactions > Banking** page. Simply check off all the New/Matched transactions and click **Batch Action** to “**Accept Selected**”.
- If you need assistance matching transactions, choose **Help menu > Search for Matching Transactions** and follow the instructions.

### Step 2: Deactivate Your Account(s) at UCCU

- Choose **Transactions > Banking**.
- Click on the account you'd like to disconnect, then click the **Pencil Icon**.
- Click on the **Edit Account Info**.
- Check the box next to **Disconnect this account on save**.
- Click **Save**.
- Repeat step 2 for each account at UCCU.

### Step 3: Re-activate Your Account(s) at UCCU

- Choose **Transactions > Banking**.
- In the upper right corner, click **Add Account**.
- Enter **Utah Community Credit Union**, and click **Find**.
- Type your **User ID** and **Password**. Click **log in**.
- Ensure you associate the accounts for **UCCU** to the appropriate account already listed under **QuickBooks Accounts**. You will want to select the matching accounts in the drop-down menu.

Most connectivity problems can be resolved by following the detailed instructions above. If you need further assistance, you can contact Intuit directly at 1 (800) 446-8848. Another option is to schedule a call with a UCCU representative for assistance at (801) 223-8188.