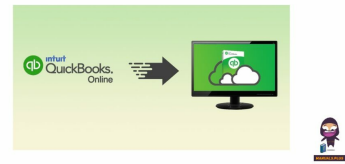


**QuickBooks Desktop
Conversion**



QuickBooks Desktop Conversion Instructions

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QuickBooks Desktop Conversion



Specifications

- **Product Name:** QuickBooks Desktop Conversion Instructions
- **Compatibility:** Windows and Mac

FAQs

- **Q: How often should I back up my QuickBooks data file?**
 - **A:** It is recommended to backup your QuickBooks data file regularly, preferably after making significant changes or transactions.

Backup Data

1. Backup QuickBooks Windows Data File & Update.
 - **a.** Choose File > Back Up Company > Create Local Backup.
 - **b.** Download the latest QuickBooks Update. Choose Help > Update QuickBooks Desktop.

Deactivate and Reconnect Accounts

1. Deactivate online banking connection for accounts connected to Westerra
 - **a.** Choose Lists menu > Chart of Accounts.
 - **b.** Right-click the first account you want to deactivate and choose Edit Account.
 - **c.** Click the Bank Feeds Settings tab in the Edit Account window.
 - **d.** Select Deactivate All Online Services and click Save & Close.
 - **e.** Click OK for any alerts or messages that may appear with the deactivation.
 - **f.** Repeat steps for any additional accounts that you need to deactivate.
2. Reconnect online banking connection for accounts that you deactivated.
 - **a.** Log in to your Westerra Digital Banking account and download your transactions to a QuickBooks (.qbo) file.
 - **Note:** Take note of your last successful upload. Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.
 - **b.** In QuickBooks, choose File > Utilities > Import > Web Connect Files. Locate your saved Web Connect file and select to import.
 - **c.** In the Select Bank Account dialog select Use an existing QuickBooks account.
 - **Important:** Do NOT select "Create a new QuickBooks account" unless you intend to add a new account to QuickBooks.
 - **d.** In the drop-down list, choose your QuickBooks account(s) and click Continue. Confirm by selecting OK.

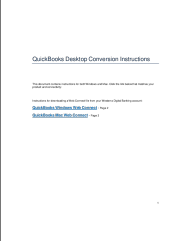
Backup Data

1. Back up your QuickBooks Mac data file & update the application.
 - **a.** Choose File > Backup.
 - **b.** Download the latest QuickBooks Update. Choose QuickBooks > Check for QuickBooks Updates.

Deactivate and Reconnect Accounts

1. Deactivate online banking connection for accounts connected to Westerra
 - **a.** Choose Lists > Chart of Accounts.
 - **b.** Select the first account you would like to deactivate and choose Edit > Edit Account.
 - **c.** Select Online Settings in the Edit Account window.
 - **d.** In the Online Account Information window, choose Not Enabled from the Download Transactions list and click Save.
 - **e.** Click OK for any dialog boxes that may appear with the deactivation.
 - **f.** Repeat steps for any additional accounts that apply.
2. Reconnect online banking connection for accounts that apply.
 - **a.** Log in to your Westerra Digital Banking site account and download your transactions into to a QuickBooks (.qbo) file.
 - **Important:** Take note of your last successful upload. Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.
 - **b.** In QuickBooks, choose File > Import > From Web Connect. Use the import dialog to import your saved Web Connect file.
 - **c.** In the Account Association window, click Select an Account to choose the appropriate existing account register.
 - **Important:** Do NOT select “NEW” under the action column unless you intend to add a new account to QuickBooks.
 - **d.** Click Continue and OK for any dialog boxes that require action.

Documents / Resources

	QuickBooks Desktop Conversion [pdf] Instructions Windows, Mac, Desktop Conversion, Conversion
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References

- [User Manual](#)

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