Deactivate Online Banking Connection in QuickBooks for Windows/Desktop

This document provides action needed and step by step instructions on how to deactivate your accounts on the current online banking connection within QuickBooks Windows/Desktop.

1. Create a QuickBooks data file backup: go to File menu >Back Up Company >Create Local Backup



2. Choose the location to save your backup file:



- 3. Deactivate all online services steps:
 - a. Go to Lists menu >Chart of Accounts

<u>E</u> ile <u>E</u> dit <u>V</u> iew	Lists	Favorites	Company	Cus	stomers	Ve
Search Company	Chart of Accounts		N	Ctrl+A		
ocaren oompany (Item List		13			

b. From Chart of Accounts list, **right click on the account** then click on **Edit Account** *Note*: To help identify the accounts you need to take actions on, look for the lightning bolt in the connectivity column. A lightning bolt represents account that is currently connected to online banking.

0	Chart of Account	ts	_ = =
Look for account name or number	h Re <u>s</u> et		
NAME		: \$: TYPE	BALANCE TOTAL ATTACH
Main Checking		S Bank	494.55
♦ Main Savings		Sank Pind	137.48
 Accumulated Depreciation 		Fixed	0.00
		New	
		EditArcount	

c. Go to Bank Feed Settings tab, choose Deactivate All Online Services then click on Save & Close

1	Account Type	Bank	•
	General	Bank Feed Settings	
Ac	count Name N	lain Checking	
	Activate Online	ervices	
	CONNECTION IN	FORMATION	
	Financial Instit	tution Anytown Bank	
	Account Cust	omer ID	
	Last Downloa	d: 12/22/2019 (3 transac	
	I Statement D	ownloads	
	III Online Bill <u>B</u> a	ayments	
•	Deactivate All Or	nline Services	
	If you deactiva	te all services, you will ha	we to set them up for this account again.

d. Repeat steps for any additional accounts that apply.