

Direct Connect Transition Instructions for QuickBooks Mac

Please follow the instructions below to reconnect your accounts to Business Online Banking following the transition on March 20, 2023. **You will need new Direct Connect login credentials.** These credentials will be sent to you via email within 10 days of the transition. If you have not received them by June 3, 2023, please contact the Transition Support Line at 833-961-3614.

Complete Prior to March 17, 2023 at 5:00 p.m. PT:

1. Backup QuickBooks Mac Data File & Update the Application.
 - a. Choose **File > Backup.**
 - b. Download the latest QuickBooks Update. Choose **QuickBooks > Check for QuickBooks Updates.**
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers. (required)

Complete On or After March 20, 2023:

1. Deactivate online banking connection for accounts connected to Columbia Bank.
 - a. Choose **Lists > Chart of Accounts.**
 - b. Click the first account you would like to deactivate and choose **Edit > Edit Account.**
 - c. Choose **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 alerts or messages 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. Choose **Banking > Online Banking Setup.**
 - b. Type **Umpqua-Business Direct Connect** in the search field, then click **Next** and follow the instructions in the setup screen.
 - c. Select **Yes, my account has been activated for QuickBooks Online Services** in the Online Banking Assistant window. Click **Next.**
 - d. Enter your new Direct Connect credentials. These are different than your Business Online Banking credentials and will be sent via email to you within 10 days of the transition on March 20, 2023. If you have not received them by June 3, 2023, please contact the Transition Support Line at 833-961-3614.
 - e. For each account you wish to download into QuickBooks, click **Select** and **Account** to connect to your existing account's registers.
 - f. Click **Next**, and then click **Done.**
 - f. Repeat this step for each account that you have connected to this institution.