

Express Web Connect Transition Instructions for QuickBooks Online

Complete on March 17, 2023 by 5:00 p.m. PT:

1. Complete a final transaction download.
2. Complete last transaction update before the change to get all of your transaction history up to date.
3. Accept all new transactions into the appropriate registers.

Complete On March 20, 2023:

Disconnect online banking connection for accounts connected to Columbia Bank.

1. Select **Banking** from the left column.
2. Click the account you want to disconnect, then click the **Pencil Icon** on the corner of that account box.
3. Click **Edit Account Info**.
4. Check the box next to **Disconnect this Account on Save**.
5. Select **Save and Close**.
6. Repeat steps for any additional accounts that apply.

Complete on March 27, 2023:

1. Reconnect online banking connection for accounts that apply.
 - a. On the Banking page, click **Add Account** in the upper-right side of the screen.
 - b. Type **Umpqua-Business Web Connect** and choose the correct option from the results.
 - c. Enter your Business Online Banking credentials and click **Continue**. Express Web Connect uses the same credentials you use for Umpqua's Business Online Banking.
 - d. Provide additional information, if requested.
 - e. Ensure you associate the accounts for Umpqua Bank to the appropriate account already listed under "Which accounts do you want to connect?" Choose the matching accounts in the drop-down menu.

Important: Do NOT select "+Add New" unless you intend to add a new account to QuickBooks Online. If you are presented with accounts you do not want to track in this QuickBooks Online Company, Uncheck the box next to the Account Name.
 - f. After all accounts have been matched, click **Connect** and then click **Finish**.
2. Exclude Duplicate Transactions.
 - a. Select **Banking** from the left column.
 - b. In the For Review section, click the checkboxes for the transactions you want to exclude.
 - c. Choose **Batch Actions > Exclude Selected**.