

## QuickBooks Mac Direct Connect

As 1st Security Bank launches a new business online banking platform, you will need to modify your QuickBooks settings to ensure your data connectivity transfers to the new platform. Please follow the instructions listed below.

### Before July 18, 2025:

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 one 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)

### On or After July 28, 2025:

1. Deactivate online banking connection for accounts connected to 1st Security 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 1st Security Bank of Washington 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 Direct Connect credentials. Direct Connect might require credentials that do not match your online banking credentials. Please call our Business Services Team at (877) 372-4249 if your login information does not work.
  - 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**.
  - g. Repeat this step for each account that you have connected to 1st Security Bank.