

QuickBooks Windows 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 Windows Data File & Update.
 - a. Choose **File > Back Up Company > Create Local Backup**.
 - b. Download the latest QuickBooks Update. Go to **Help > Update QuickBooks Desktop**.
2. Complete a final transaction download and match downloaded transactions.
 - 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** menu > **Chart of Accounts**.
 - b. Right-click on the first account you would like 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 apply.
2. Reconnect online banking connection for accounts that apply.
 - a. Choose **Lists** menu > **Chart of Accounts**.
 - b. Right-click on an account you would like to activate and choose **Edit Account**.
 - c. Select **Set Up Bank Feeds** on the bottom of the popup screen and select Yes in the dialog box that will appear.
 - d. Enter 1st Security Bank of Washington in the search field and select **Continue**.
 - e. 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.
 - f. Ensure you associate the accounts to the appropriate accounts already listed in QuickBooks. Link to your existing accounts in the drop-down options labeled Select Existing or Create New.

Important: Do NOT select "Create New Account" unless you intend to add a new account to QuickBooks. If you are presented with accounts you do not want to track in this data file, choose Do Not Add to QuickBooks.

- g. After all accounts have been matched, click **Next** and then click **Done**.