

# QuickBooks Desktop Import QBO

Backup QuickBooks Desktop Data File & Update.

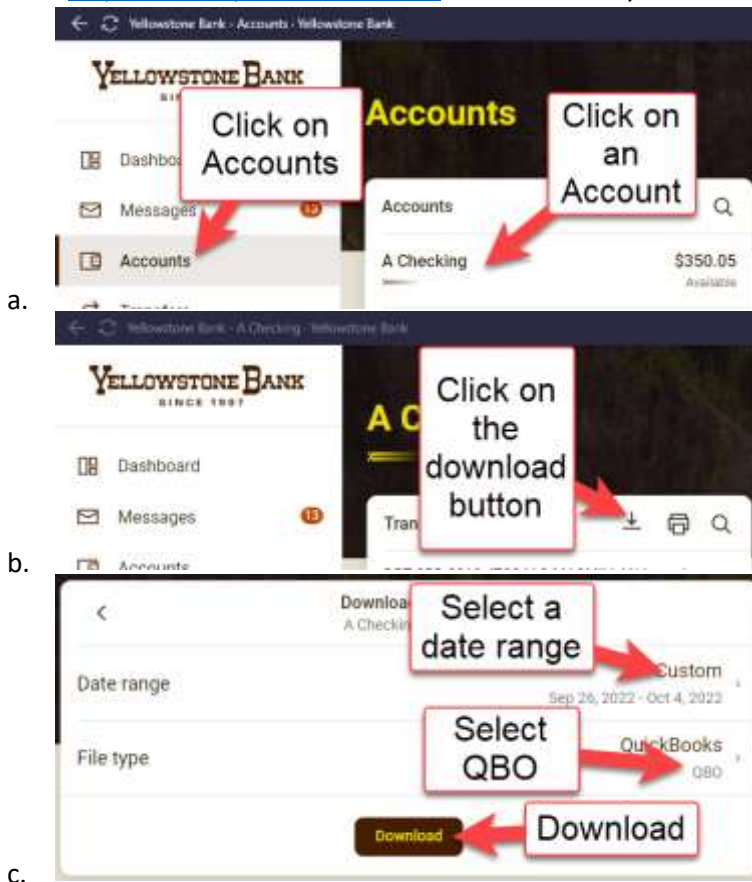
- a) Choose **File > Back Up Company > Create Local Backup**.
- b) Download the latest QuickBooks Update. Choose **Help > Update QuickBooks Desktop**.

Deactivate online banking connection for accounts connected to Yellowstone Bank.

- a) Choose **Lists menu > Chart of Accounts**.
- b) Right-click the first account you want 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 you need to deactivate.

Reconnect online banking connection for accounts that you deactivated.

- a) Log in to <https://www.yellowstone.bank> and download your transactions to a QuickBooks (.qbo) file.



**Note: Take note of your last successful download.** Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.

- b) In QuickBooks, choose **File > Utilities > Import > Web Connect Files**. Locate your saved Web Connect file and select to import.
- c) In the Select Bank Account dialog select **Use an existing QuickBooks account**.  
**Important: Do NOT select "Create a new QuickBooks account" unless you intend to add a new account to QuickBooks.**
- d) In the drop-down list, choose your QuickBooks account(s) and click **Continue**. Confirm by selecting **OK**.