



DIGITAL UPGRADE INSTRUCTIONS

As Stone Bank completes our digital upgrade, you will need to modify your QuickBooks Online settings to ensure that your data connectivity transfers smoothly to the new system.

This document contains instructions for both connectivity types (Express Web Connect and Web Connect).

These instructions refer to two "Action Dates."

1st Action Date: Thursday, December 5th, 2024

A data file backup and a final transaction download should be completed by this date.

Please make sure to complete the final download before this date since transaction history might not be available after the upgrade.

2nd Action Date: Monday, December 9th, 2024

This is the action date for the remaining steps on the conversion instructions. You will complete the deactivate/reactivate of your online banking connection to ensure that you get your current Quicken or QuickBooks accounts set up with the new connection.

IMPORTANT: Express Web Connect will not be available until 5 business days after the 2nd Action Date, so please utilize another connectivity type if you need transaction updates during this downtime.

To navigate this document, just visit the page listed below that matches your product connectivity:

Instructions for One-Step Update initiated from within QuickBooks Online
QuickBooks Online Express Web Connect - Page 2

Instructions for Downloading a Web Connect file from your Online Banking Site
QuickBooks Online Web Connect - Page 3



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(833) 253-2265

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QUICKBOOKS ONLINE EXPRESS WEB CONNECT

On the 1st Action Date (Thursday, December 5):

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.

On the 2nd Action Date (Monday, December 9):

Disconnect online banking connection for accounts connected to the financial institution that is requesting this change.

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 5 business days after 2nd Deadline Date:

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 your financial institution's name and choose the correct option from the results.
 - c. Enter your financial institution credentials and click Continue. Express Web Connect uses the same credentials you use for your online banking.
 - d. Provide additional information, if requested.
 - e. Ensure you associate the accounts for your financial institution 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.

QUICKBOOKS ONLINE WEB CONNECT

On the 1st Action Date (Thursday, December 5):

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.

On the 2nd Action Date (Monday, December 9):

1. Disconnect online banking connection for accounts connected to financial institution that is requesting this change.
 - a. Select Banking from the left column.
 - b. Click on the account you would like to disconnect, then click the Pencil icon on the corner of that account box.
 - c. Click Edit Account Info.
 - d. Check the box next to Disconnect this Account on Save.
 - e. Click Save and Close.
 - f. Repeat steps for any additional accounts that apply.
2. Reconnect online banking connection for accounts that apply.
 - a. Download a Web Connect file (.qbo or .qfx) from your Stone Bank online banking account.
 - b. In QuickBooks Online, choose Banking from the left column.
 - c. Click File Upload in the upper-right side of the screen and use the upload dialog to locate the Web Connect file you downloaded in step a.
 - d. Choose the appropriate account from the drop-down menu under QuickBooks Account and then click Next.
Important: Do NOT choose “+Add New” in the drop-down menu unless you intend to add a new account to QuickBooks Online.
 - e. When the import is finished, click Let's go!
 - f. Review the For Review tab on the Banking page to view what was downloaded.
 - g. Click Next, and then click Done.
 - h. Repeat this step for each account that you have connected to this institution.