Fairfield Federal Savings and Loan
Conversion Instructions for Quick Books

Task 1: Deactivate Your Account(s)

> **NOTE:** All transactions must be matched or added to the register prior to deactivating your account(s).

1. Choose **Lists menu > Chart of Accounts**.

2. Select the account you want to deactivate.

3. Choose **Edit menu > Edit Account**.

4. Click on the **Online Services** tab in the Edit Account window. The tab is named **Bank Feed Settings** in QuickBooks 2014 and newer.

5. Select **Deactivate All Online Services** and click **Save & Close**.

6. Click **OK** for any dialog boxes that may appear with the deactivation.

7. Repeat steps 2 – 6 for each account at *Old FI Listing.*

8. Backup your data file.

Task 2: Re-activate Your Account(s)

---

1. If **QuickBooks 2013** choose **Banking** menu > **Online Banking Center**.

   If **QuickBooks 2014** or newer choose **Banking** menu > **Bank Feeds** > **Bank Feeds Center**.

2. Choose *New FI Listing* and click **Next**.

3. If prompted for connectivity type, select **Direct Connect**.

4. Link your bank account with the existing QuickBooks account and click **Connect**.

5. Repeat steps 1 – 5 for all accounts at *New FI Listing.*

Task 3: Re-enable Side by Side Mode (if necessary)

> **NOTE:** If you prefer register mode, you are finished with your conversion. If you use the Side by Side mode (Express Mode in QuickBooks 2014 and newer) for online banking, you may now re-enable the mode.

For instructions to enable Side by Side mode (Express Mode), choose **Help** > **QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

Task 4: Recreate Online Payments

Fairfield Federal Savings and Loan
Conversion Instructions for Quick Books

1. If you do **not** use bill pay within QuickBooks, your conversion is complete. If you use online bill payments from within QuickBooks, you will now want to recreate your online bill payments.

2. For assistance in recreating payments, choose **Help menu > QuickBooks Help**. Search for **Pay A Vendor Online** and follow the instructions.

Thank you for making these important changes!