

QuickBooks – Windows – Express Web Connect

Express Web Connect - Setup

Procedures

Task 1: Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **QuickBooks Help**. Search for **Back Up** and follow the instructions.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu > **QuickBooks Help**. Search for **Update QuickBooks**, then select **Update QuickBooks** and follow the instructions.

NOTE: If multiple computers do not use the same QuickBooks data file, **skip step 3**. QuickBooks activities such as **Online Banking** cannot be performed in multi-user mode because of the way the activities interact with a company data file.

3. Switch to single-user mode. For instructions to switch to single-user mode, choose **Help** menu > **QuickBooks Help**. Search for **Switch to Single-User Mode** and follow the instructions.

NOTE: If you are not using Classic Mode (Register Mode), enable it for this exercise. You may restore it after.

Task 2: Setup Bank Feed for an Account

1. Choose **Banking** menu > **Bank Feeds** > **Setup Bank Feed for an Account**.
2. Enter, then select **SVB Private**. Click Next.
3. Please click on “Use Advanced Setup” link to select **Express Web Connect**.
4. Enter you Digital Banking login credentials, and click **Connect**.

NOTE: We have implemented improved multi-factor authentication for Digital Banking users that initiate account data transmission from Intuit software or digital technologies, utilizing the **Express Web Connect**. Users will be prompted to choose a **Secure Access Code delivery** point from within the respective Intuit application. Re-authenticating the connection is only required once, provided the user continues to connect from the same device, at the same location. Please contact the Concierge Desk at 888-322-2120 if you have any questions or have issues authenticating your Digital Banking login access.

- Ensure you associate the account to the appropriate account already listed in QuickBooks. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu. Then **Connect**.