

QuickBooks Desktop Conversion Instructions

QuickBooks Windows Web Connect

On or after April 9, 2025 deactivate the online banking connection for accounts connected to Sovita.

1. Choose **Lists** menu > **Chart of Accounts**.
2. Right-click the first account you want to deactivate and choose **Edit Account**.
3. Click the **Bank Feeds Settings** tab in the Edit Account window.
4. Select **Deactivate All Online Services** and click **Save & Close**.
5. Click **OK** for any alerts or messages that may appear with the deactivation.
6. Repeat steps for any additional accounts that you need to deactivate.

Reconnect online banking connection for accounts that you deactivated.

1. Log in to Sovita's online banking site and download your transactions to a QuickBooks (.qbo) file.

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

2. In QuickBooks, choose **File > Utilities > Import > Web Connect Files**. Locate your saved Web Connect file and select to import.
3. 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.

4. In the drop-down list, choose your QuickBooks account(s) and click **Continue**. Confirm by selecting **OK**.

QuickBooks Mac Web Connect

On or after April 9, 2025 deactivate the online banking connection for accounts connected to Sovita.

1. Choose **Lists > Chart of Accounts**.
2. Select the first account you would like to deactivate and choose **Edit > Edit Account**.
3. Select **Online Settings** in the Edit Account window.
4. In the Online Account Information window, choose **Not Enabled** from the **Download Transactions** list and click **Save**.
5. Click **OK** for any dialog boxes that may appear with the deactivation.
6. Repeat steps for any additional accounts that apply.

Reconnect online banking connection for accounts that apply.

1. Log in to Sovita's online banking site and download your transactions to a QuickBooks (.qbo) file.

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

2. In QuickBooks, choose **File > Import > From Web Connect**. Use the import dialog to import your saved Web Connect file.
3. In the Account Association window, click **Select an Account** to choose the appropriate existing account register.

Important: Do NOT select "NEW" under the action column unless you intend to add a new account to QuickBooks.

4. Click **Continue** and **OK** for any dialog boxes that require action.