



Reconnect to QuickBooks® Desktop

Step 1: On or before July 19th

Back up QuickBooks Windows data file and update your version of QuickBooks Desktop

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

Step 2: On or after July 22nd

In order to link your new bank accounts to QuickBooks, you must first disconnect your former bank accounts then establish a link with your new bank accounts.

Instructions from Intuit:

https://quickbooks.intuit.com/learn-support/en-us/help-article/bank-feeds/disconnect-bank-feeds-account-quickbooks-desktop/L767TYYN_US_en_US

Note:

- You must resolve (match or delete) all pending transactions before disconnecting account links
- This change NOT delete transaction or account data from QuickBooks® installation

Step 3: Link new bank account(s) to QuickBooks

This step re-establishes accounts with your new bank to your QuickBooks®.

Instructions from Intuit®:

https://quickbooks.intuit.com/learn-support/en-us/help-article/bank-connectivity/get-started-bank-feeds-quickbooks-desktop/L5gZcG2QI_US_en_US

Selecting which Bank to Connect – in the ‘Search’ field, type in **“Glacier Family of Banks – Treasury Management”** and select **“Glacier Family of Banks – TM – DC”**.



Step 4: Obtain Intuit Code

For this connection, it is necessary to use an Intuit Code provided by the bank. To obtain your Intuit Code, please send us a **Secure Message** through Insight Treasury. To do this select **Message Center > Compose >** Select **Security** under Subject > type **Intuit Code** in the message then **Send**.

In the Intuit Login ID field, you will first include the Intuit Code followed by your normal Login ID.

Example:

Login ID: 0002EAjdoe17 (Intuit PIN + your user ID)

You will use your normal password to access Insight Treasury.

Note:

- Bank accounts must be linked to the **same QuickBooks account** as your prior bank feed – this will ensure your account and transaction data is accurate
- To sync bank transactions, QuickBooks Desktop requires you use your online banking password to download the transaction data.