QuickBooks Online Conversion Instructions

As we complete the conversion to Northwest Bank, you will need to modify your QuickBooks Online settings to ensure that your data connectivity transfers smoothly. This document contains instructions for both connectivity types (Express Web Connect and Web Connect).

To ensure a seamless transition, pay attention to the dates and steps that need to be completed on time.

IMPORTANT: Express Web Connect will not be available from Friday, July 25 at 5 p.m. until Monday, August 4, so please use another connectivity type if you need transaction updates during this downtime.

To navigate this document, simply click the link below that matches your product connectivity:

Instructions for One-Step Update Initiated from within QuickBooks Online

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Instructions for Downloading a Web Connect file from Northwest Online Banking

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QuickBooks Online Express Web Connect

Before Friday, July 25 at 5 p.m.:

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.

Beginning Monday, July 28:

Disconnect online banking connection for accounts connected to JSSB or Luzerne.

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.

Beginning Monday, August 4:

1. Reconnect business 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 Northwest and choose Northwest Bank (PA) from the results.
    c. Enter your Northwest 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 Northwest 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

Before Friday, July 25 at 5 p.m.:

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.

Beginning Monday, July 28:

1. Disconnect business online banking connection for accounts connected to JSSB or Luzerne.
    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 business online banking connection for accounts that apply.
    a. Log in to Northwest Online Banking and navigate to Services > Intuit WebConnect to download your transactions to a QuickBooks file. Save the file to an easily-accessible location. Note: Take note of your last successful upload. Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.
    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 "AddNew" 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 Northwest.