Columbia Bank
Count on Columbia.

Product: QuickBooks Online Web Connect

As RSI Bank completes its system conversion to Columbia Bank, you will need to modify your QuickBooks settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your login credentials for online banking.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes. Thank you for making these important changes!

Business customers should be linking to 'Columbia Bank Bus WC'.
Retail customers should be linking to 'Columbia Bank NJ QB Personal'.

By 10/14/2022 at 5pm:
1. Complete a final transaction download from your RSI Quicken connection.
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.

After noon on 10/17/2022:
1. Disconnect online banking connection for accounts connected to financial institution that is requesting this change.
   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.
1. Reconnect online banking connection for accounts that apply.
   a. Download a Web Connect file (.qbo or .qfx) from your financial institution's online banking site.
   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 "+Add New" 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 this institution.