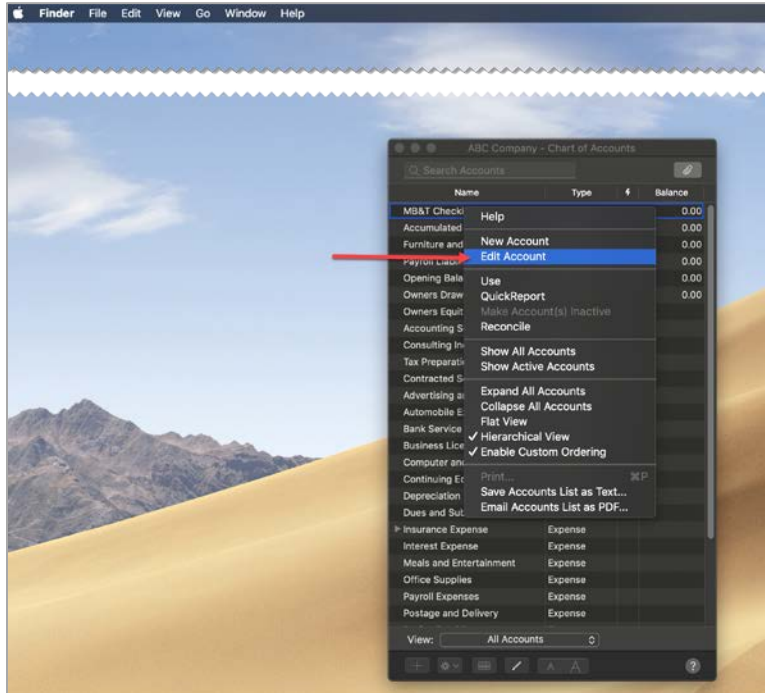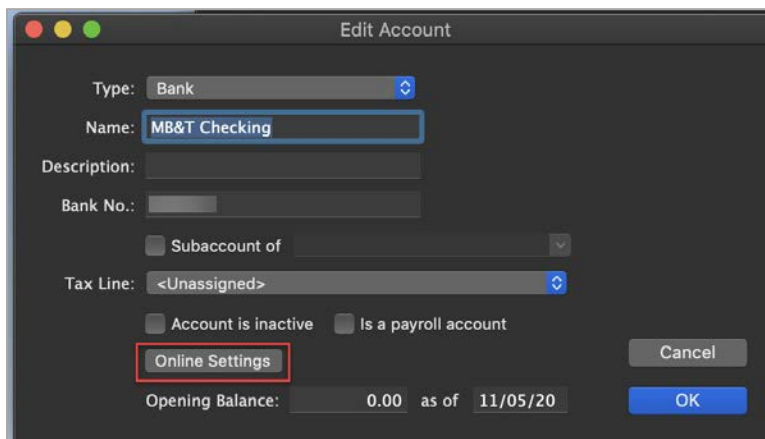# Mac QuickBooks Reconnection Guide

Please follow the following steps to reconnect your MB&T online services in QuickBooks.
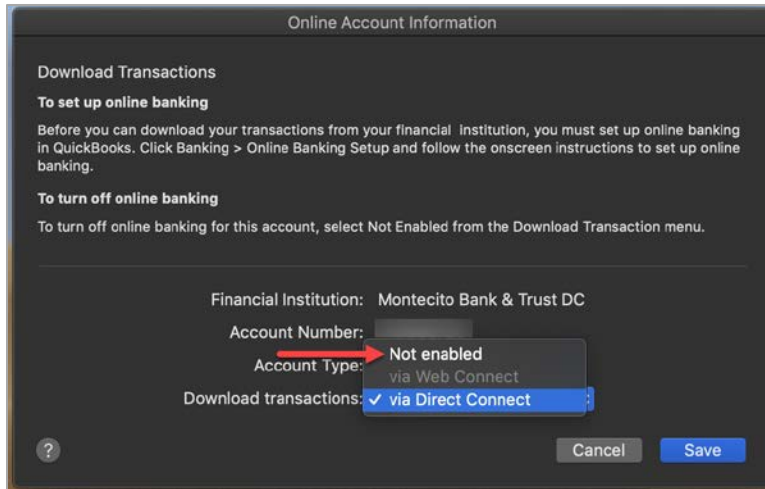
1. Right click on one of your MB&T accounts listed in your **Chart of Accounts**. Select **Edit Account**.
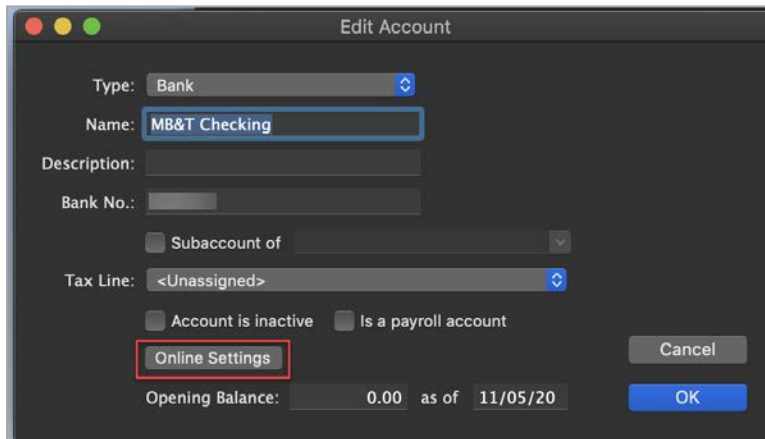
2. Click the **Online Settings** button.

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3. Change the **Download Transaction** setting to **Not Enabled** to temporarily disable Online Services. Click **Save**. Repeat this step for every MB&T account in QuickBooks.
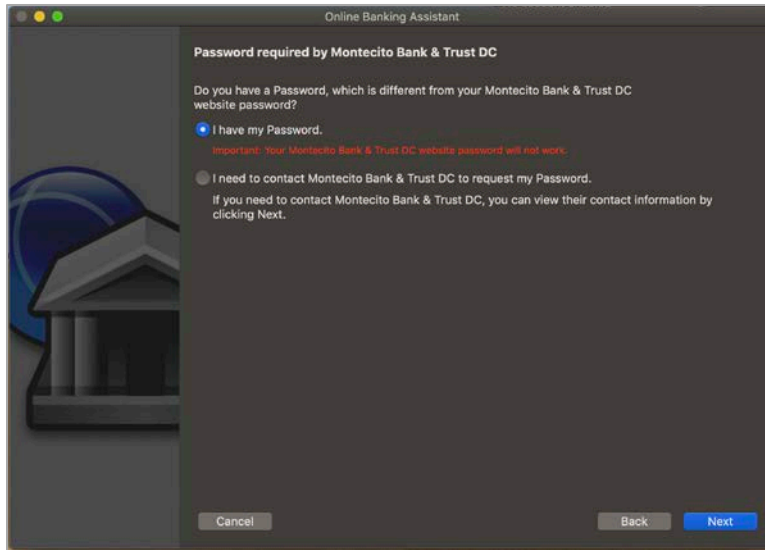

4. After all MB&T accounts have been deactivated from Online Services, return to the **Chart of Accounts** and right click on any MB&T account. Click the **Online Settings** button again.
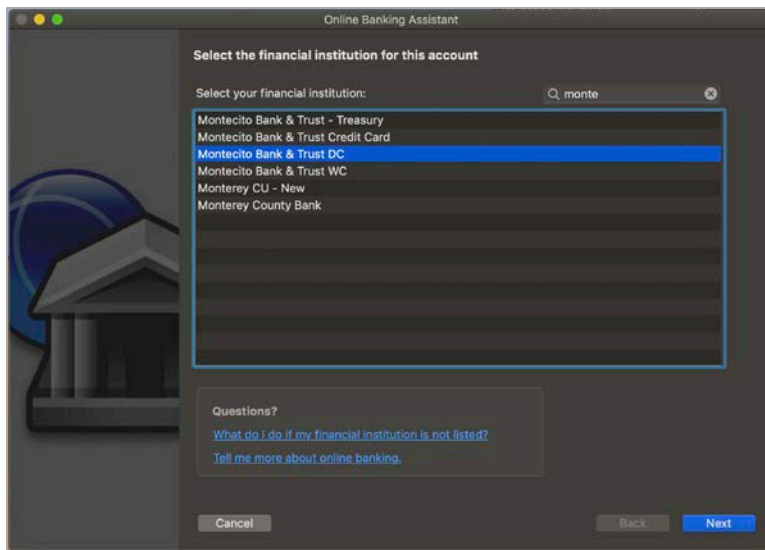

5. The system will prompt you to set up Online Settings. Click **Set Up**.

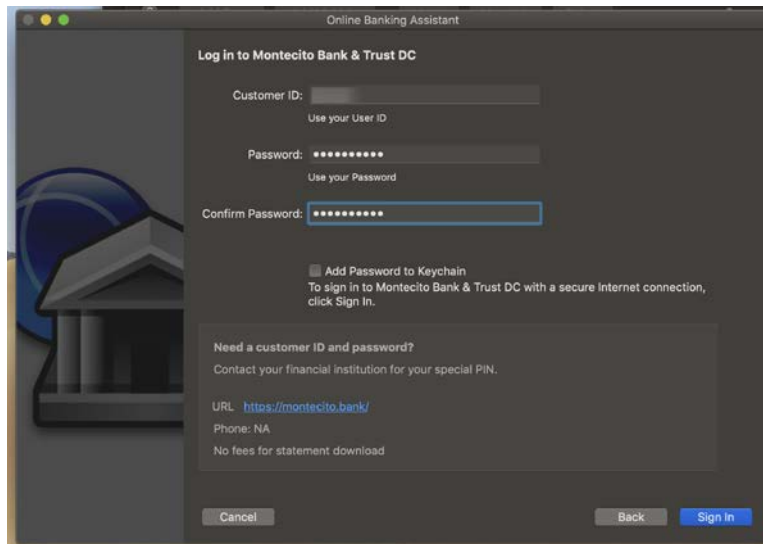Montecito Bank & Trust • 805-963-7511

6. When prompted, select **I have my Password** and click **Next**.

7. Type **Montecito Bank and Trust** in the Financial Institution search and click **Montecito Bank and Trust DC**. Click **Next**.

8. Enter your Online Banking credentials for Montecito Bank and Trust and click **Sign In**.
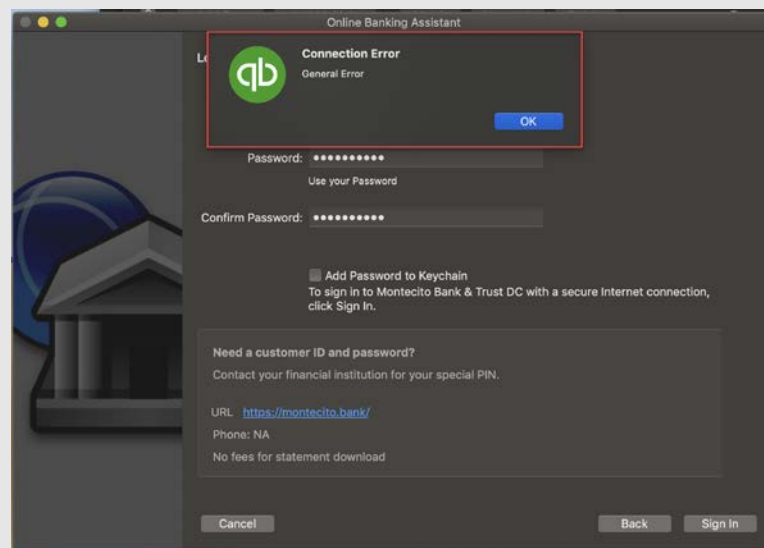

Authorize QuickBooks Connection in Online Banking

Direct Connect has to be authorized by you in Online Banking before QuickBooks can be linked.
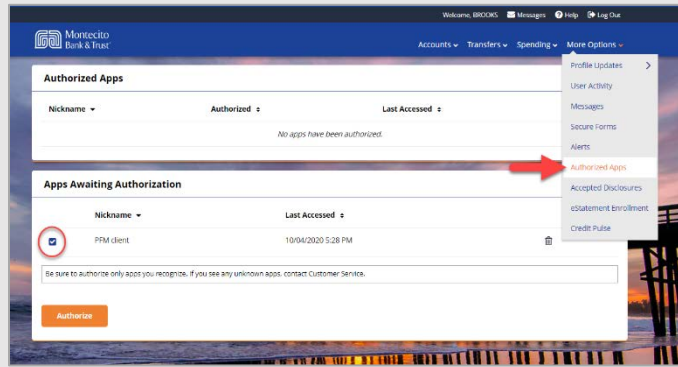
The first time you try to connect with your Online Banking credentials, you will receive a connection error – this is expected. A request for authentication will be sent to your Online Banking account.

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To authorize:

1. Go to **montecito.bank** and log into Online Banking with your credentials.

2. In Online Banking, go to **More Options**, then **Authorized Apps**.

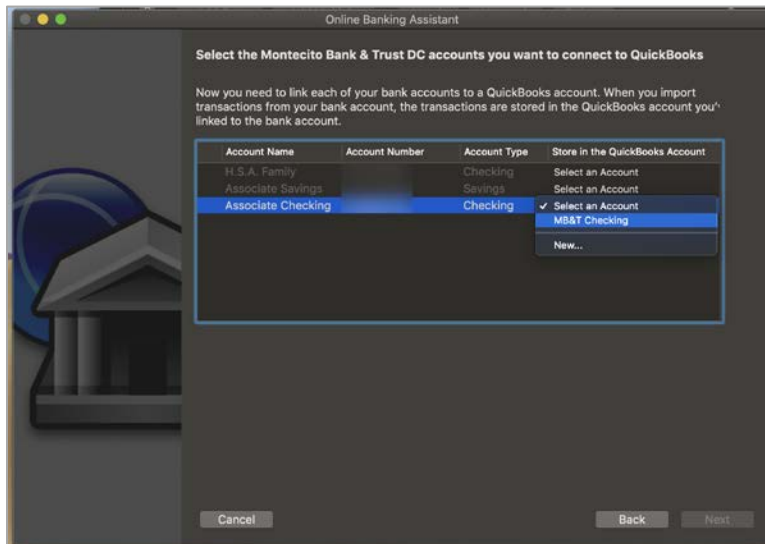3. Check **PFM Client**, and then click **Authorize**.

Once the authorization is complete, you can return to Quicken and try connecting again.

9. Choose an action in the **Store in the QuickBooks Account** column for each account listed before you click **Next**. To link your existing QuickBooks accounts, select the appropriate QuickBooks account from the drop-down for each account in Online Banking.
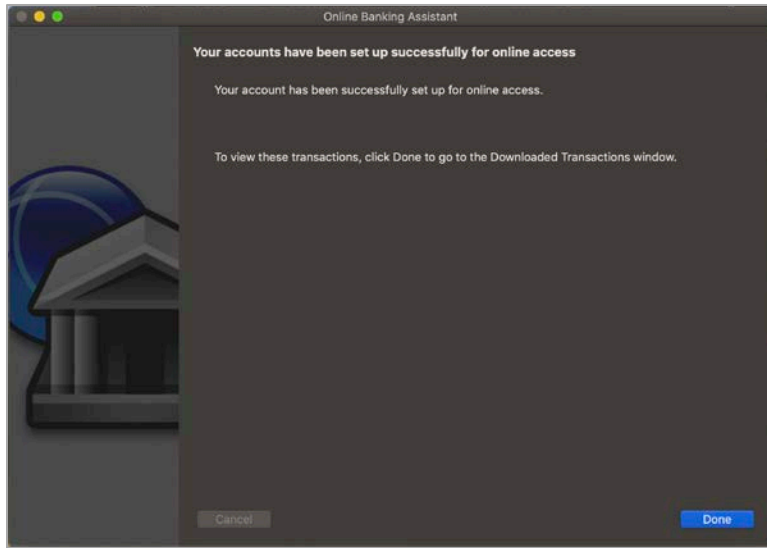
> **Note:** It is critical that you choose the correct action for each account displayed. To link to an existing account in QuickBooks, select the appropriate QuickBooks account from the drop-down for each account found in Online Banking.
>
> Selecting "New…" will create a new account in QuickBooks. Leave blank to ignore.

10. A confirmation will display when the connection is complete. Click **Done**.

11. Your downloaded transactions should now be available in the **Downloaded Transactions** window.

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