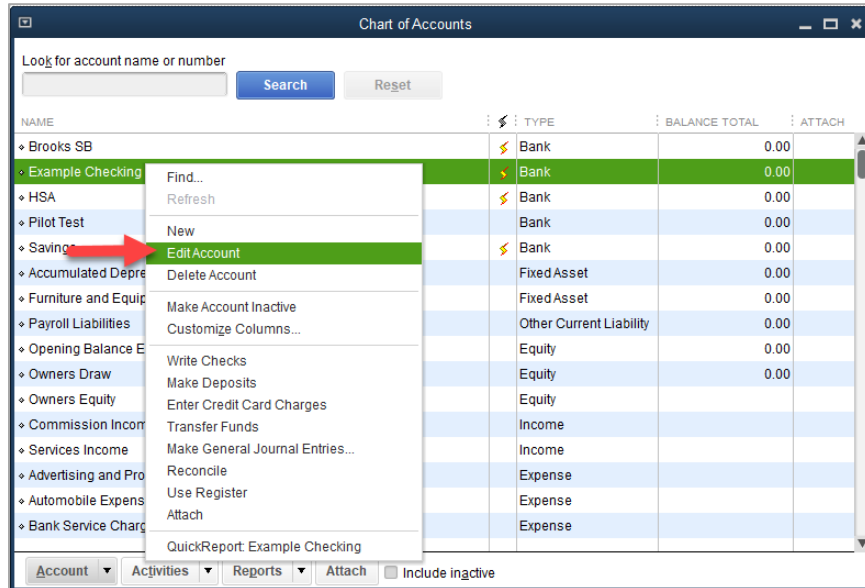# Windows QuickBooks Reconnection Guide

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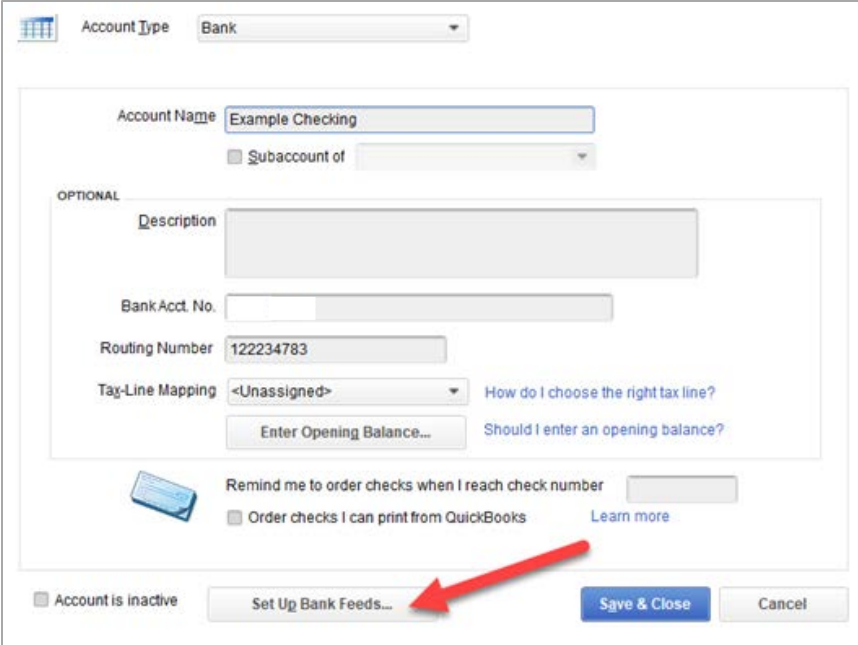
1. Right click on one of your MB&T accounts listed in your **Chart of Accounts**. Select **Edit Account**.

2. Click on the **Bank Feed Settings** tab and click **Deactivate All Online Services.** Repeat this step for every MB&T account in QuickBooks.

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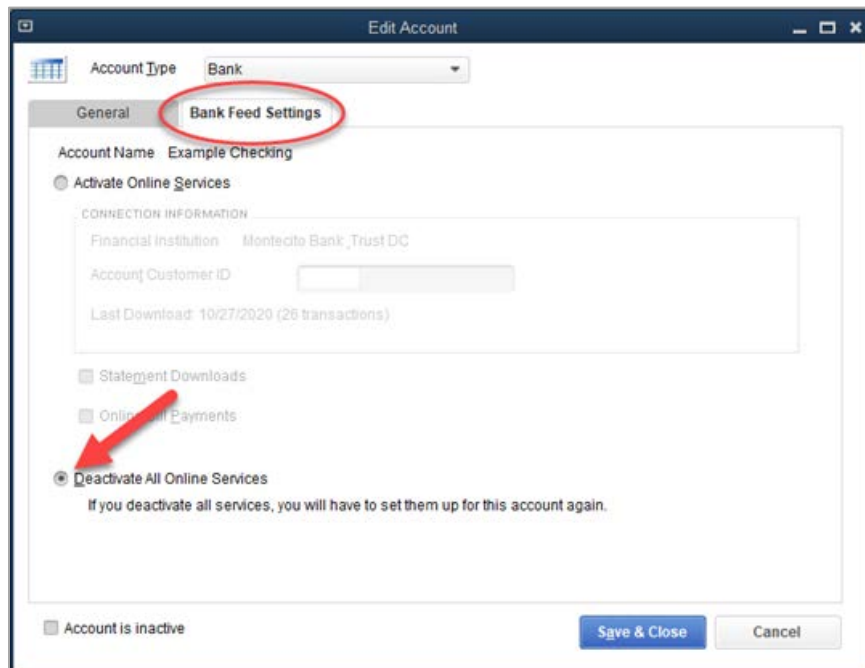
3. After all MB&T accounts have been deactivated from Online Services, return to the **Chart of Accounts** and right click on any MB&T account. Click **Set Up Bank Feeds**.
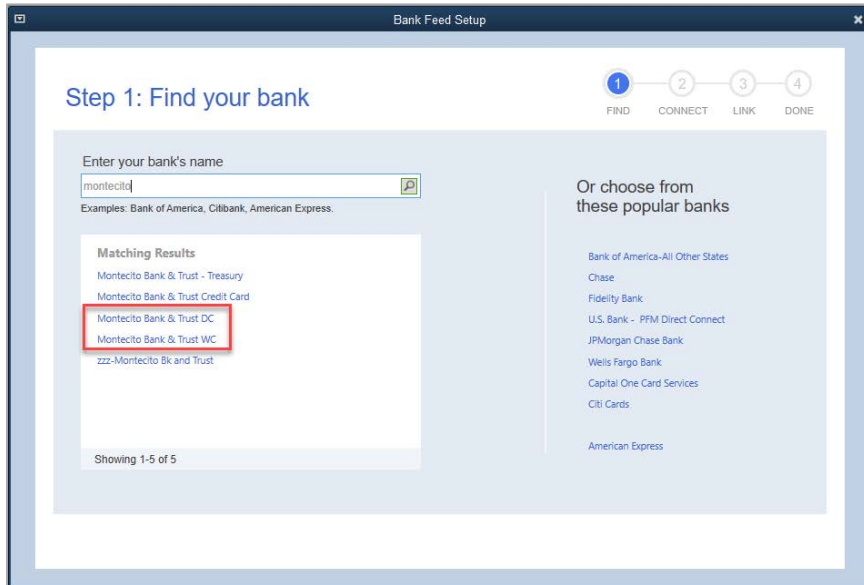

4. An alert may ask if it can close open windows to set up Bank Feeds. Click **Yes**.

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5. Search for "**Montecito Bank & Trust.**" Select **Montecito Bank & Trust DC** for Direct Connect.

6. Enter your MB&T Online Banking credentials and click **Connect**.

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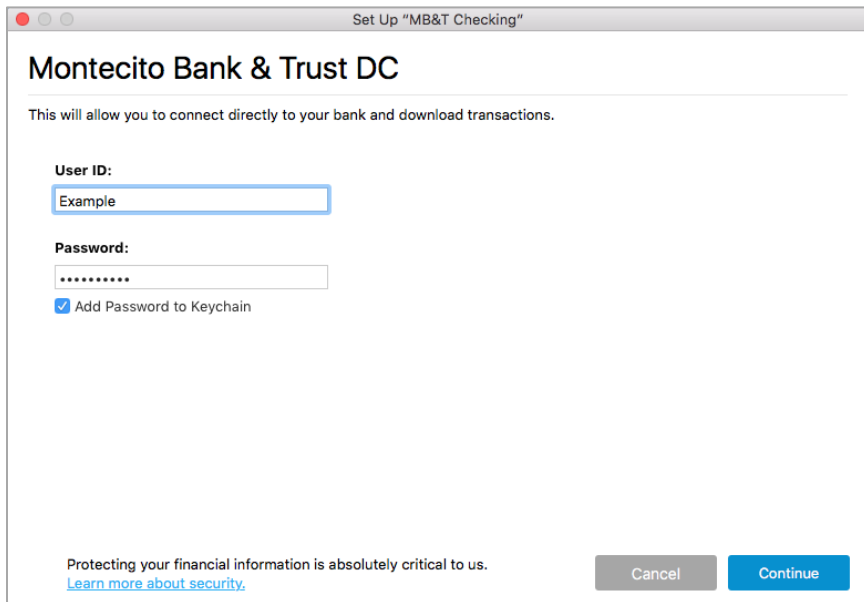
## ***Authorize QuickBooks Connection in Online Banking***

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.
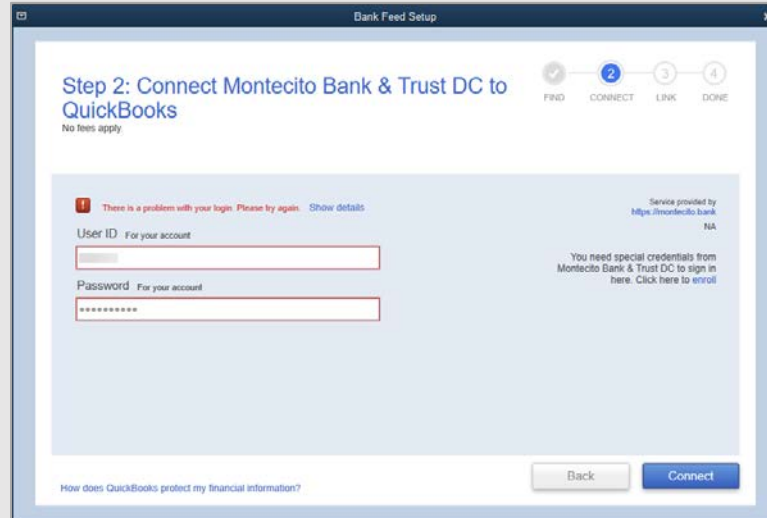
To authorize:

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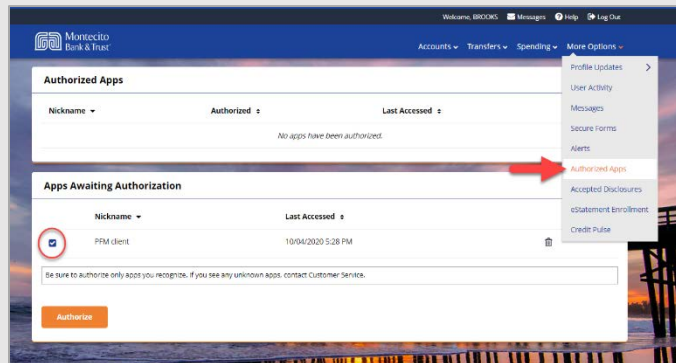
Once the authorization is complete, you can return to Quicken and try connecting again.

7. Select an **Action** for each account listed before you click **Continue**. To link your existing QuickBooks accounts, select the appropriate QuickBooks account from the drop-down for each account found 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.
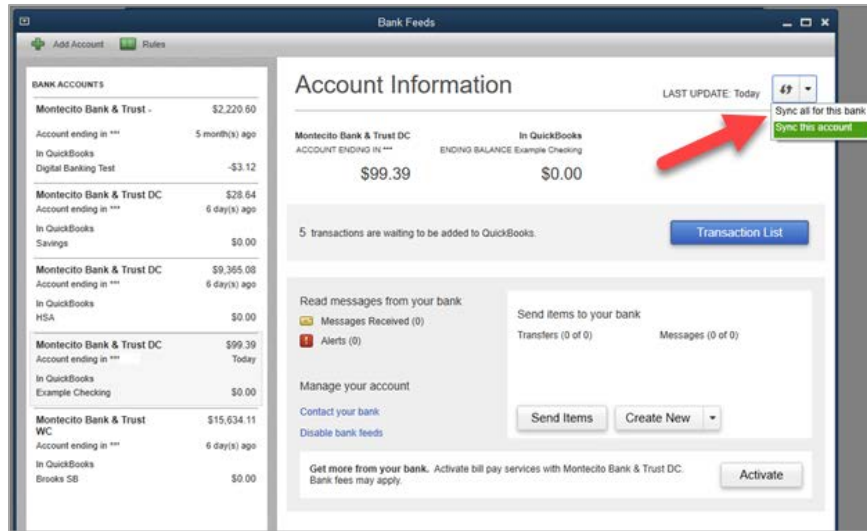>
> Selecting "Create New" will create a new account in QuickBooks.
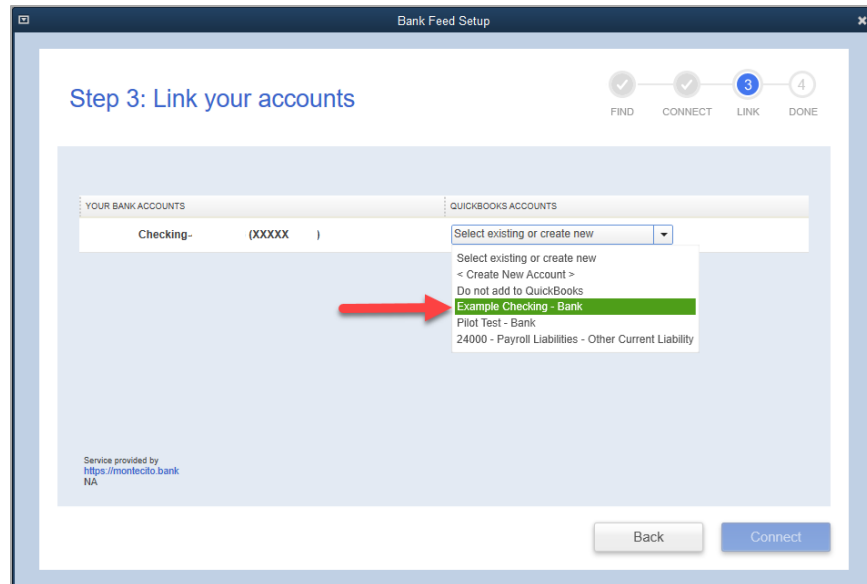
8. A confirmation will display when the connection is complete.

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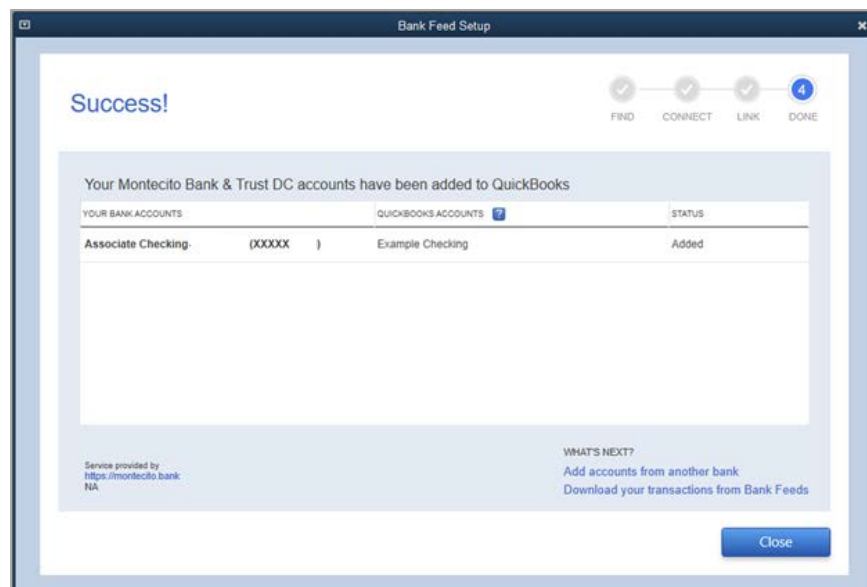
9. You can now bring in new transactions for your accounts using Direct Connect by going to **Bank Feeds**, and selecting **Synch All For This Bank** or **Synch This Account**.

10. Enter your Online Banking password to connect and download your transactions.

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