TOMPKINS

Reconnecting to Quicken & Quickbooks On or After April 9

QuickBooks Online

If you connect to your Treasury Management account via QuickBooks Online, you will need to update your credentials within QuickBooks after establishing your Digital ID (username) and password.

Follow the below steps to disconnect your accounts and reconnect them with your updated credentials.

To update your credentials, launch QuickBooks, navigate to Transactions > Bank Transactions. Once your accounts appear, click the account tile, then on the pencil icon, and click on Edit Account Info.





Choose 'Disconnect this account on save', choose Yes, then Save. Complete these steps for each account.

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To reconnect, open Settings (top-right corner, looks like a gear or cog wheel), Tools > Import Data.

YOUR COMPANY	LISTS	TOOLS	PROFILE
Account and settings	All lists	Order checks 🖉	Subscriptions and billing
Manage users	Products and services	Import data	Feedback
Custom form styles	Recurring transactions	Import desktop data	Privacy
Chart of accounts	Attachments	Export data	Switch company
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Set the desktop app	Tags	Budgeting	
Additional info	Rules	Audit log	
		Share screen	
		Resolution center	

Select Record type 'Bank Data' from the dropdown then press Import.

E∗ Digital Banking Test Corp Import data	😒 Business Feed 🔒 Contact experts 🛛 🧐 Hulp	ш	۹	٥	8	0
What do you want to import?						

Choose 'Find your bank' on the right, Search for 'Tompkins' then choose Tompkins Community Bank Treasury Management.

		RECOMMENDED
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Link your act	counts to save time	on entering bank
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Let'	s get a picture of your profits	
Conne	ct your bank or credit card to bring in your transactions.	
Tomp	kins	×
8 out of	8 results for Tompkins	
	Tompkins Community Bank Treasury Management https://www.tompkinsbank.com	Î

Enter your new Digital ID as your username, followed by your Treasury Management password, then Continue. Verify. Then, choose what to connect.

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Need Assistance?

Please call us at 888-273-3210.

QuickBooks Desktop

If you connect to your Treasury Management account via QuickBooks Desktop, you will need to update your username within QuickBooks after establishing your Digital ID (username) and password.

To update, click the bank icon in your account tile(s) > Disable Bank Feeds > Enter updated username in Account Customer ID field > Save & Close



Need Assistance? Please

Please call us at 888-273-3210.

Quicken

If you connect to your Treasury Management account via Quicken, you will need to update your credentials within Quicken after establishing your Digital ID (username) and password by deactivating and reactivating your accounts.

Access each account in Quicken > Click the Gear Icon in the upper right corner > Edit Account Details > Click Deactivate > Click on Set Up Now > Enter your username and password > Connect.

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