

QuickBooks® Upgraded Connection Instructions

Treasury Central *Connect* Upgrade:

Treasury Central *Connect* implemented an upgrade on December 6, 2024. This action reset the connection for some of our users within QuickBooks Online. If you were impacted by this, you will need to re-link your Treasury Central *Connect* accounts. Please complete the steps below, using your Treasury Central *Connect* credentials (they are different from your Treasury Central credentials). If you need to reset your Treasury Central *Connect* username or password, please email treasurycentral@stifelbank.com.

To Reconnect Your Accounts to QuickBooks Online:

1. Log in to QuickBooks Online and click **Transactions** and then **Bank Transactions** in the left navigation menu.
2. Click **Link Account**.
3. Search for **Stifel Bank** and select **Stifel Bank – Treasury Central**.
4. Enter your **Treasury Central *Connect* User ID** and **Password**. Do not use your Treasury Central credentials.
5. Click **Login**.
6. Review and accept the Stifel Bank Treasury Central *Connect* Terms and Conditions if presented. Click **Continue**.
7. Select the **Stifel Bank Accounts** you wish to connect and select the appropriate **Account Type** from the drop-down.
8. Select the date you want to import transactions from. Stifel Bank allows a maximum of 90 days of transaction history. Click **Connect**.