QuickBooks® Instructions

Step 1: Connect a bank or credit card account

You can connect as many business and personal accounts as you want

1. Go to **Bookkeeping** then **Transactions** then select **Bank Transactions**, or go to **Banking**.
2. If this is the first bank account you've set up, select **Connect Account**. Or select **Link Account** if you already created one.
   Note: If you're moving from QuickBooks® Desktop, you'll need to connect your bank/credit card accounts again for security reasons.
3. In the search field, enter the name for your bank, credit card, or credit union.
   Note: If you can't find your bank but still want to add your transactions, you can **_manually upload your bank transactions_**.
4. Select **Continue**. Then sign in to your bank with your user ID and password.
5. Follow the on-screen steps. This might include security checks your bank requires. It could take a few minutes to connect.
6. Select the accounts you want to connect, then select the **account type** ▼dropdown. Choose the account type that matches **_your chart of accounts_** in QuickBooks®.

If you don't see the right account type in the dropdown

7. Select how far back you want to download transactions. Some banks let you download the last 90 days of transactions. Others can go back as far as 24 months.
8. Select **Connect**.

Connect your bank account from your chart of accounts (optional)

Step 2: Download recent transactions

QuickBooks® downloads transactions so you don't have to enter them manually. Refresh the bank feed to download your latest transactions.

1. Go to **Bookkeeping** then **Transactions** then select **Bank Transactions**, or go to **Banking**.
2. Select **Update**.

Step 3: Categorize downloaded transactions

Once QuickBooks® downloads your transactions, you'll want need to **_review and categorize your transactions_** to make sure they're categorized right.

Visit **_QuickBooks® Learn and Support US (intuit.com)_** for additional assistance.

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