

2021

CONNECTING BANK & CREDIT CARD ACCOUNT TO QUICKBOOKS

EASY AS 1, 2, 3...

4, 5



Step by step guide

01. Login to your QuickBooks Online account + on the left hand side click on **“Banking”** + **“Banking”** to bring up the bank feed.

02. On the top right hand corner, click on **“Link account”** or **“Add account”**.

03. You will then be directed to your online bank or credit card login site. Login using your bank or credit card login + follow the steps to update.

04. Make sure to choose the correct date to pull transactions into QBO. You will want to choose the start date of the account or from January 1st of the current year if your taxes have already been filed for the prior year.

05. After updating the account, if you do not see transactions that have now come into QBO, then refresh your screen or click on **“Update”** on the top right hand corner of the bank feed within QuickBooks Online.