Linking to QuickBooks

Connecting QuickBooks to your Credit Union creates a secure, read-only link that automatically downloads your recent transactions.

Linking QuickBooks

Use the following steps to link QuickBooks.

Step	Action
1	Click the **Link account** button at the upper right of the screen.
2	Enter keywords in the **Search by name or sign in URL** to locate the Credit Union.
3	Click the drop-down arrow next to the **account** to be linked.
4	Click to select the **+ Add new** hyperlink.
5	Click and enter the **Account Name** in the Account Name field.
6	Click the **Account type** drop-down arrow to select the Account type to be linked.
7	Click the **Detail Type** drop-down arrow to add a sub-category that best describes the account to be linked.
8	Optional: Click the **Make this subaccount** box to nest under a parent account.
9	Optional: Click to enter the balance in the **Opening balance** field.
10	Optional: Enter a brief note in the **Description** field.
11	Optional: Click the **Cancel** button to end the linking process.
12	Click the **Save** button to link the account.
13	From the **date-range** drop-down, select the date when the account should be linked to QuickBooks from the following options: - Today - This month - This year - Last year - Custom
14	Click the **Connect** button to finalize the process.

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