How To Download Transactions Into A QuickBooks File

I recommend that you back-up your QuickBooks file before doing this for the first time.

1. In QuickBooks go to lists, chart of accounts and right click on the bank account you want to download. Then select "**Edit"**.

2. At the bottom of the page click on "**Set Up Online Services**". It will ask if you are sure. Click "**YES**".

3. A screen will open and ask you to "**Find your financial institution**", so click on the drop down arrow and scroll down until you locate it. Then click on your financial institution.

4. Then click "**NEXT"**.

5. A screen will come up saying you have to "**Log into your account**" to set it up.

6. Click "**Go to my bank's website**", login and follow instructions from there.

7. Once it is set up, log into your online banking and locate on the screen where it says "**Download transactions**". You may have to go to your bank account and bring up the statement and at the bottom of that page it will say "download transactions".

8. Click on '**Download transactions**" and it will ask you to "**Choose the software**".

9. Pick "**Intuit QuickBooks**".

10. It will ask you to "**Pick a date range**".

11. A screen will come up and ask if you want to "**Save to a file or import"**

12. Click "**IMPORT**".

13. You will be asked "**Which account**". Select your bank account and it will be imported from there.

Congratulations!