How to Connect Your Bank and Credit Card Accounts to QuickBooks Online

This guide walks you through connecting your bank and credit card accounts to QuickBooks Online (QBO) so transactions are automatically downloaded for bookkeeping. The process takes about 5–10 minutes per account.

Before You Begin

Make sure you have the following information ready before you start:

- Your QuickBooks Online login credentials (email and password)
- Your online banking login credentials (username and password) for each bank or credit card you want to connect
- Access to your bank's multi-factor authentication method (text message or authenticator app), if your bank requires it
- Know which accounts to connect — only connect accounts used for business purposes

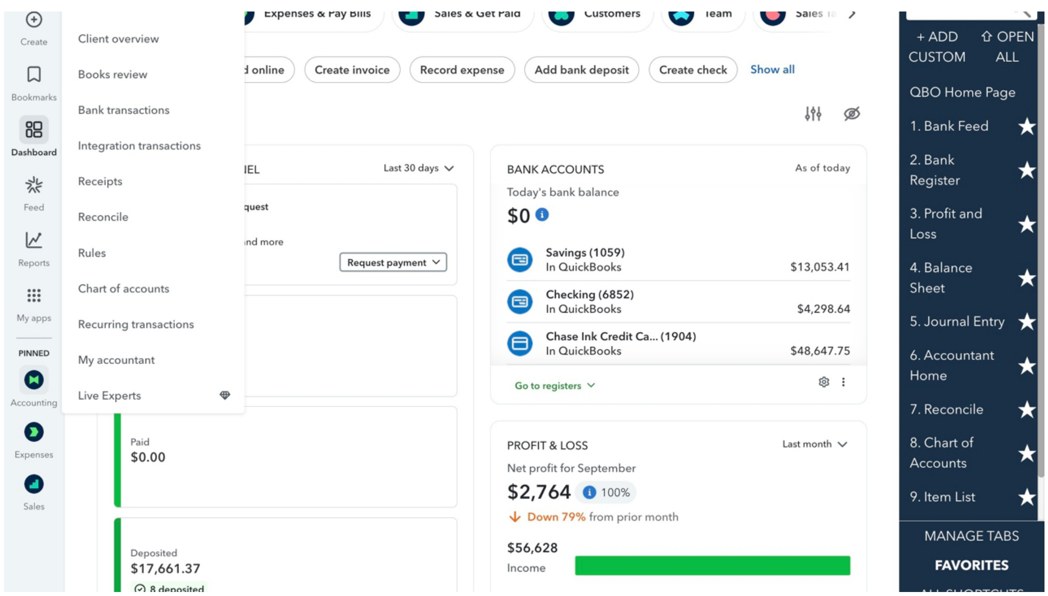
> **Note:** Only connect accounts that are used for business transactions. Connecting personal accounts will mix personal and business transactions, creating extra work and potential errors in your books.

Step 1: Sign In to QuickBooks Online

Open your web browser and go to:

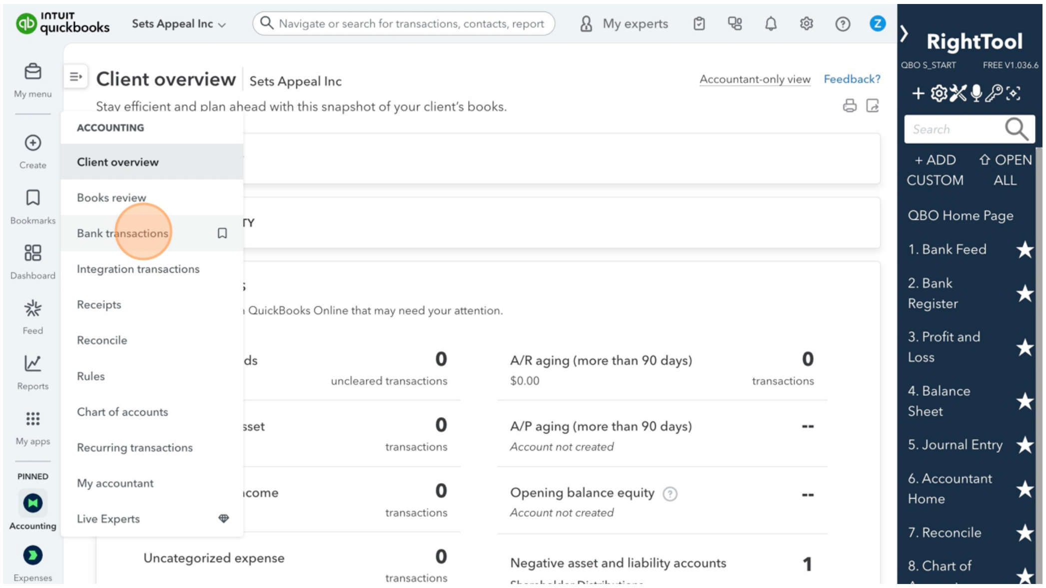
https://qbo.intuit.com

Sign in with your QuickBooks credentials. Once logged in, click 'Accounting' on the left-hand navigation menu.



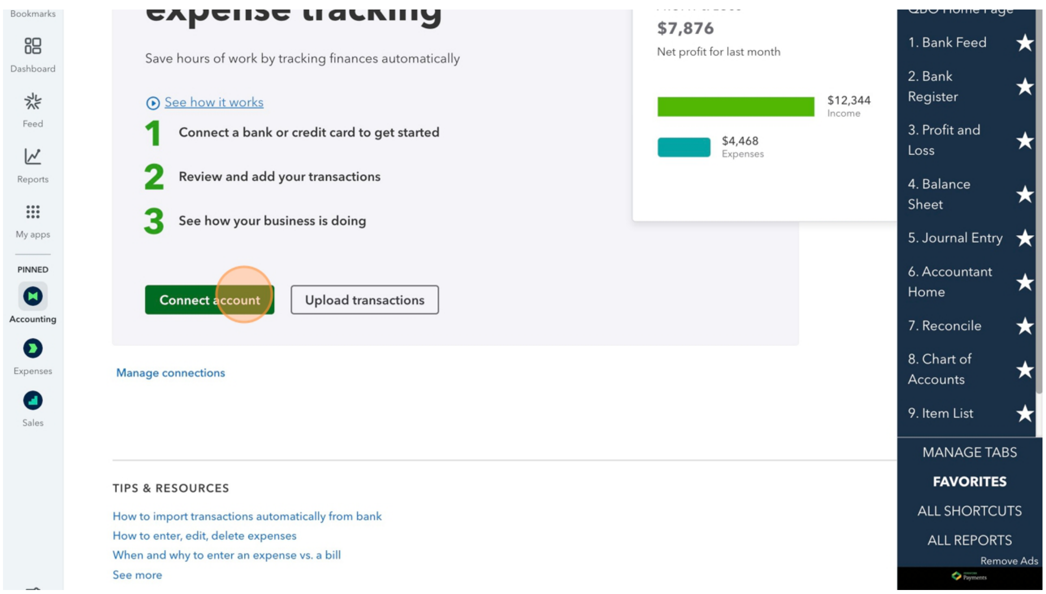
Step 2: Click "Bank Transactions"

At the top of the Accounting page, click the 'Bank transactions' tab.



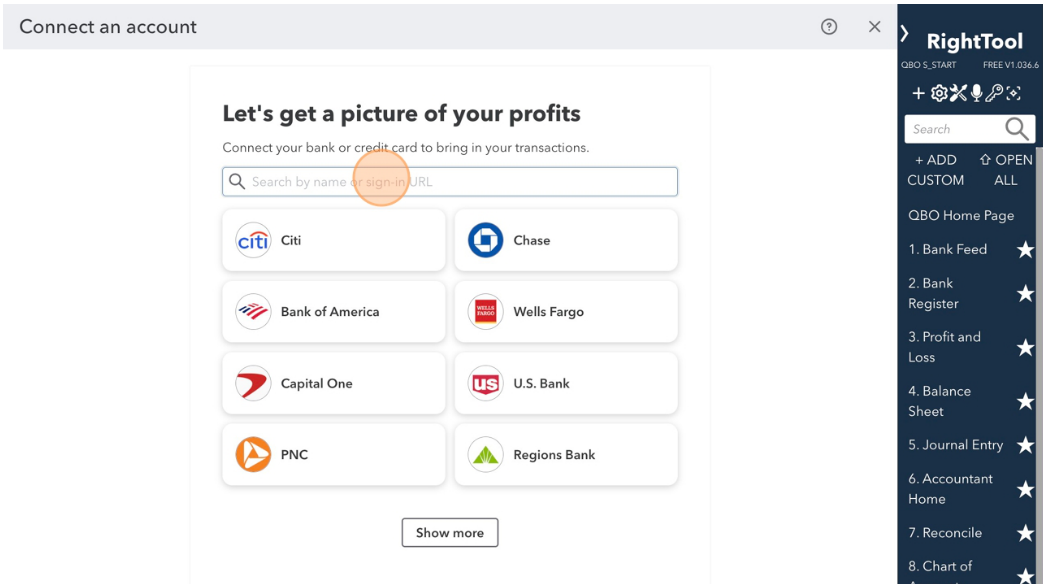
Step 3: Click "Connect Account"

Click the 'Connect account' button to begin linking a new bank or credit card account.



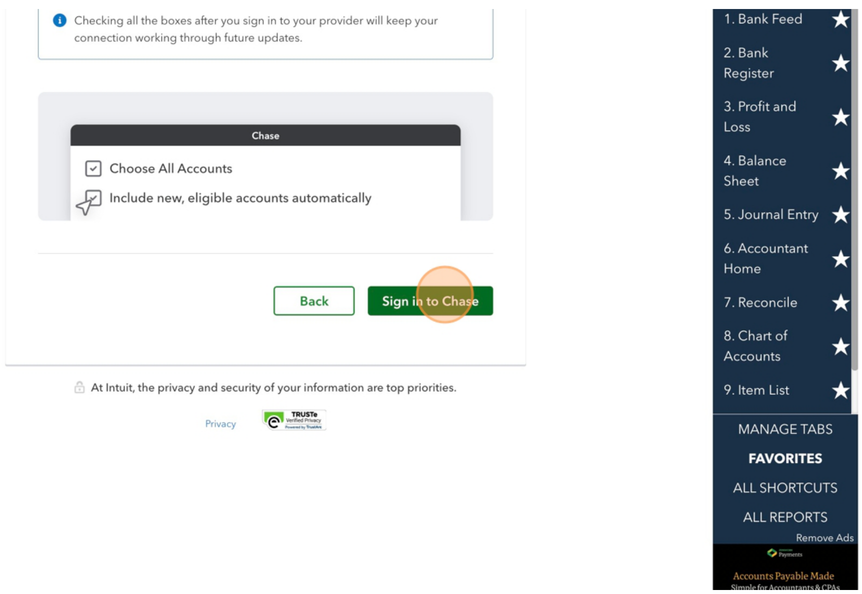
Step 4: Search for Your Bank or Credit Card

In the search box, type the name of your bank or credit card company. Many of the larger financial institutions will already be listed below the search box for easy selection.



Step 5: Sign In to Your Bank

Click 'Sign in' next to your bank's name. You will be redirected to your bank's login page.

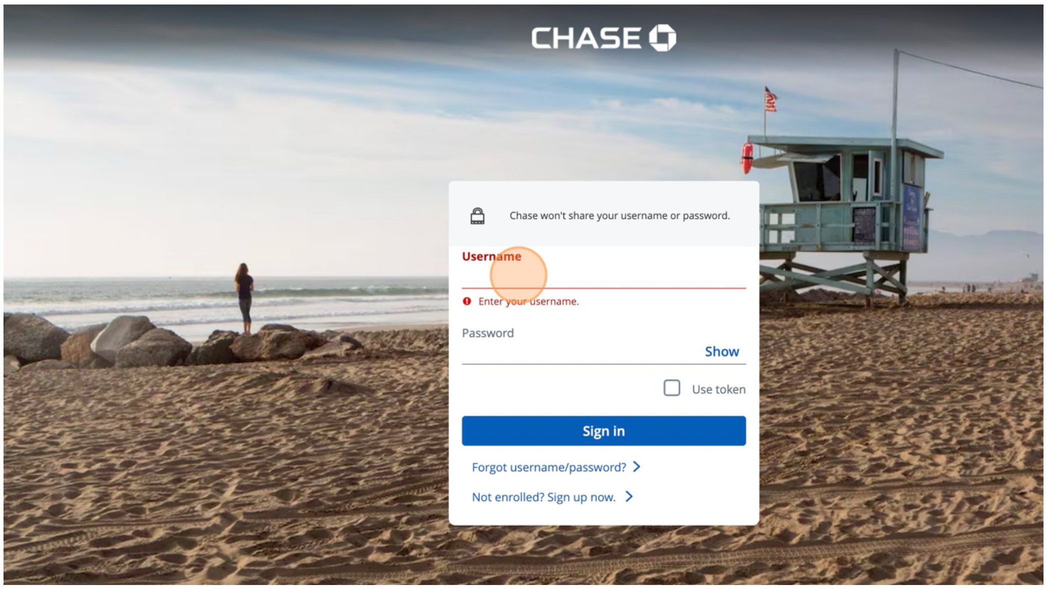


Step 6: Complete the Bank Login and Select Your Accounts

Enter your online banking username and password. Your bank may require additional verification (such as a text message code).

Once logged in, you will see a list of your accounts at that bank. Select only the accounts that are used for business — checking accounts, savings accounts, and credit cards as applicable.

Click 'Connect' or 'Finish' to complete the process.



> **Important:** If you have multiple banks or credit cards to connect, repeat Steps 3–6 for each one.

> **Tip:** After connecting, QuickBooks will begin downloading recent transactions (typically 90 days of history). It may take a few minutes for all transactions to appear.

What Happens Next

Once your accounts are connected, transactions will automatically download into QuickBooks on an ongoing basis. Our team will review and categorize these transactions as part of your bookkeeping service.

If a bank connection breaks or requires re-authentication, QuickBooks will notify you. Simply log back in to QuickBooks and follow the prompts to reconnect.

Need Help?

If you run into any issues or have questions at any point during this process, contact our office:

Email: zack@taxpreptech.com

Phone: (347) 249-4990