Linking Bank Accounts & Credit Cards on QBO

1st	**Log In to QuickBooks Online** • Go to QuickBooks Online. • Enter your login credentials to access your QuickBooks Online account.
2nd	**Navigate to the Banking Menu** • From the left-hand menu, select Banking or Transactions. • Click on the Banking tab if you're not already there.
3rd	**Connect an Account** • Click on the Link Account or Add Account button in the top right corner of the Banking page.
4th	**Search for Your Bank or Credit Card** • In the search field, enter the name of your bank or credit card company. • Select your bank or credit card from the list of suggestions.
5th	**Enter Your Bank Credentials** • Enter your online banking username and password. • Follow the prompts to verify your identity. This may include answering security questions or entering a one-time passcode sent to your phone or email.

6th	**Choose Accounts to Connect** • Once logged in, you will see a list of accounts associated with your online banking credentials. • Select the accounts you want to connect to QuickBooks Online. You can connect multiple accounts, such as checking, savings, and credit card accounts.
7th	**Set the Date Range for Transactions** • Choose the date range for the transactions you want to import. QuickBooks Online typically allows you to import up to 90 days of past transactions. • Confirm the selection to start importing transactions.
8th	**Review and Categorize Transactions** • After connecting your accounts, QuickBooks Online will start importing transactions. • Review the imported transactions in the **For Review** tab under the **Banking** menu. • Categorize each transaction by selecting the appropriate expense or income category. You can also add a rule to automate the categorization of similar transactions in the future.
9th	**Match Transactions** • QuickBooks will attempt to match imported transactions with those you've already entered into your register. • Review and confirm the matches, or manually match transactions if needed.
10th	**Reconcile Accounts** • Regularly reconcile your bank and credit card accounts to ensure the accuracy of your financial records. • Go to the Accounting menu and select Reconcile. • Follow the prompts to complete the reconciliation process, matching your QuickBooks balance with your bank statements.

Additional Tips	**Automate Bank Feeds:** Set up bank rules to automate the categorization of transactions, saving time on manual entry. **Review Regularly:** Regularly review your linked accounts to ensure all transactions are accurately categorized and no transactions are missed. **Update Credentials:** If you change your online banking credentials, update them in QuickBooks Online to maintain the connection.
Troubleshooting	**Connection Issues:** If you encounter issues connecting your bank or credit card, ensure your online banking credentials are correct and check with your bank for any security settings that might block the connection. **Missing Transactions:** If transactions are missing, manually update the bank feed by clicking on the Update button in the Banking menu.