

Update Bank Accounts in QuickBooks Online

- 1. Log into QuickBooks
- 2. Click on Banking

Dashboard	
Banking	

3. Click Update

•			
Ģ	Update	-	Add account

4. If QuickBooks needs to re-validate your online banking information you will get a notice. Click on Complete Secure Connection

Checking	Ø		
\$3,896,252.06 BANK BALANCE	Moments ago		
\$-42,530.63 N QUICKBOOKS	•		
		2	

5. QuickBooks will connect to online banking



6. Answer one of the three security questions you setup when logging into online banking

<i>Teople's</i> BANK	Peoples Bank of Commerce-Medford https://www.peoplesbank.bank/ 541-776-5350
o keen vour accou	ints safe. Peoples Bank of Commerce-Medford is asking for info only you
o keep your accou hould know.	ints safe, Peoples Bank of Commerce-Medford is asking for info only you
o keep your accou hould know. Vhat is your oldes	Ints safe, Peoples Bank of Commerce-Medford is asking for info only you

7. QuickBooks will then connect to online banking

Connecting to Peoples Bank of Commerce-Medfor	

8. Click Done

Connection Complete We are bringing in your latest transactions now.	
	Done

9. Any new online banking transactions will be brought into QuickBooks Online



10. Review and add the transactions brought over from online banking

Banking	Rules							
\$3 BAN	1,896,252.06 IK BALANCE	Moments ago						
\$4 IN C	\$4,048,615.87 1000							
For	For Reviewed Excluded Excluded G to Register							
0	We were able to get trans	sactions from Peoples Bank of Commer	ce-Medfor starting from 02/28/2019.				×	
You ci	an match items to existing reco	ords or add them as new records. Need more	data?					
Ba	Batch actions * 🗸 * All All (1000) Recognized (0)							
	DATE 🔻	DESCRIPTION	PAYEE	CATEGORY OR MATCH	SPENT	RECEIVED	ACTION	
	03/12/2019			Sales		\$1,000.00	Add	
	03/12/2019			Sales		\$500.00	Add	